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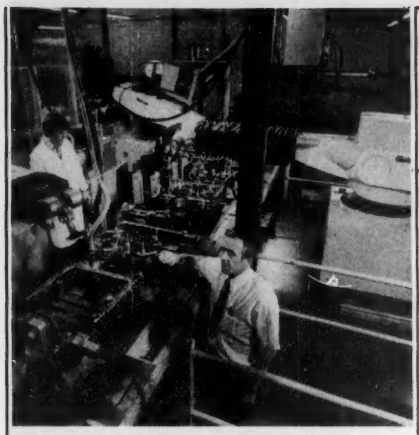
8 December 1978

News from the Departments of Industry·Trade·Prices & Consumer Protection



Government's view on the new microelectronics technology is that Britain has to be up with the leaders on the application side and at least maintain a reasonable capability in manufacturing microelectronic devices. See page 492.

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Trade and Industry this week

HOME

Microelectronics won't go away – Varley

'The pace of international competition is such that we have to make every effort to keep the design of manufactured products up to date if we are to retain or improve our market share,' said Eric Varley, Secretary of State for Industry, when he opened the design engineering show in Birmingham on Monday.

He explained that the incorporation of microelectronics technology, where appropriate, was only one of several necessary ingredients, but increasingly the advantages in terms of product performance or cost gained from the microprocessor or other form of microelectronic device would be the determining factor in future markets.

'Hopefully, many manufacturers currently involved in modernising their existing product range will ask themselves whether or not the time is ripe for them to incorporate microelectronics, and perhaps some of those who are confidently resting on their laurels will have second thoughts before the opposition arrives in the market place,' he said. He stressed that microelectronics would not just go away.

What industry and government had to do was to shape Britain's future by making sure that it was as good as the next, or preferably better when it came to updating products with the latest technology. Only in this way could Britain maintain its markets, maximise employment and improve living standards.

It was the government's view, he added, that Britain must be up with the leaders on the application of microelectronics and at least maintain a reasonable capability on manufacturing and supplying microelectronic devices. He believed far more jobs were at risk through loss of market share than through microelectronics technology which could generate as many new jobs as it displaced.

Eric Varley being shown applications of microprocessors by Trevor Gilpin of the Department of Industry's electronics applications division on the DoI stand at the design engineering show.

Demand for data services found

There is a demonstrable demand for new national and international data transmission services, according to a Department of Industry report published today (8 December). It concludes that services should use digital plant and, where appropriate, work to overcome limitations of existing facilities.

The 'Report of the national committee on computer networks' says that these new services should include packet switching, circuit switching, and leased services in accordance with internationally agreed standards.

DoI is currently considering the report's recommendations before holding discussions with interested parties. The report is available free of charge from the Department of Industry, CSE 2A, Room 214, Dean Bradley House, Horseferry Road, London SW1P 2AG, tel. 01-212 0128.

Over £1.6m mineral exploration grants

Assistance of £1,600,199 for mineral exploration projects in Great Britain was approved by the Department of Industry by the end of March under the Mineral Exploration and Investment Grants Act 1972.

The sixth annual report on the act published on Tuesday (HMSO, 25p) states that so far 44 companies involved in mineral exploration in 156 areas have applied for assistance totalling £2,515,181. Of these projects, 76 were in Scotland and the rest were in Wales, south-west England, north of England and Pennines, and west Midlands.

The report shows that during the year 11 companies – six British and five overseas firms registered in Britain – applied for £844,386 worth of aid for 23 exploration projects, or further stages of existing projects. Twenty were for non-ferrous exploration, two for fluorspar, and one for potash.

In addition to assistance already awarded by the department, a further £932,950 involving 30 projects is still under consideration. Work on 107 projects has been finalised.

Reserves down: early repayments

Half the fall in UK official reserves in November was due to the $150 million made available to the British National Oil Corporation to make an early repayment of its borrowing abroad.

Reserves fell by $302 million during the month. Accruals of foreign currency borrowing by the public sector under the exchange cover scheme amounted to $50 million, and repayments to $20 million. At the end of November, the reserves stood at $15,669 million.

Don't neglect London's domestic tourists – Smith

Domestic tourists should not be neglected in any strategy for developing tourism in London, trade secretary John Smith said on Tuesday.

A strategy should also provide value for money and should take account of social costs, such as land use, traffic and noise, he told a conference on tourism growth and London accommodation, sponsored jointly by the British Tourist Authority and the English Tourist Board.

Mr Smith said he knew domestic tourists' contribution to London's economy was relatively low by comparison with overseas tourists, but the increase in leisure and in secondary holidays could make an important added contribution to off-season revenue.

He reminded his audience that London must be careful to maintain sensible tariffs since it probably set the tone, rightly or wrongly, for the whole of Britain as far as the tourist was concerned.

Mr Smith added that this country needed to look at the service industries, of which tourism was a notable example, as an additional source of income and work.

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Royal Smithfield show opens

Perkins Engines are among the exhibitors at this year's Royal Smithfield show which opened at Earls Court on Monday.

Leicestershire aid for small firms

Leicester's launch of the small firms counselling scheme took place in the city's county rooms on Monday, attended by representatives of chambers of commerce and trade, trade associations, banks and local authorities.

A team of local businessmen will be available through the Nottingham Small Firms Information Centre to proprietors and managers of small firms to discuss problems and suggest courses of action. The initial interview will be free, the second session £5 and subsequent counselling sessions (up to 10 in a year) £15.

The scheme will be administered by the Small Firms Information Centre in Maid Marian Way, Nottingham (tel. 0602 49793), but counsellors will operate from local offices to provide an on-the-spot service to all small firms and businesses.

Safety code for seamen

Several hundred recommendations and instructions aimed at improving working conditions at sea were published on Wednesday in a code of safe working practices for merchant seamen.

The code covers all aspects of safety on board merchant ships and aims to give merchant seamen protection in their place of work similar to that enjoyed by workers on shore under health and safety at work legislation.

Among the subjects covered are health and hygiene, working and protective clothing and equipment, emergency procedures, access to and movement about the ship, entry to enclosed spaces, painting and working aloft or outboard, cargo handling, lifting appliances, work in galleys, work in machinery spaces, and overhaul of machinery. Also covered is work peculiar to various types of vessels in normal service such as tankers, bulk carriers and ferries.

The code is based on the recommendations made by the steering committee on the safety of merchant seamen at work set up by the Department of Trade in 1974.

The recently published Merchant Shipping Bill (see page 482) strengthens the powers of the trade secretary to make regulations to secure the safety of ships, and the safety and health of persons on board, and to make the code mandatory.

The code, published by the marine division of the Department of Trade, is available from HMSO (£3.50).

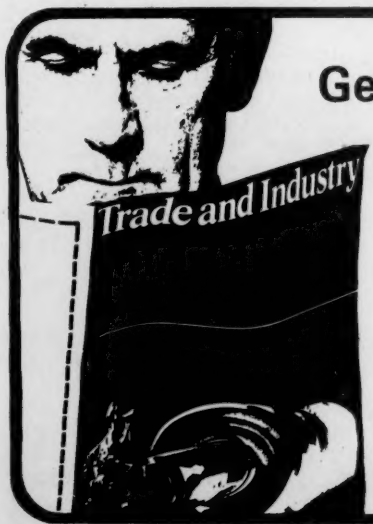
Chinese aviation minister visits UK

Chinese Minister for the Third Ministry of Machine Building, Lu Tung, is visiting aviation establishments during a two-week visit to the UK which started on Thursday.

Lu Tung, here as the guest of trade secretary John Smith, is responsible for aviation. He is accompanied by Tuan Tzu-Chun his deputy minister, and a delegation of 23 advisors and experts.

The party will visit British Aerospace plants, the Royal Aircraft Establishment, Rolls-Royce, the National Gas Turbines Establishment, Marconi Avionics, Redifon Simulation, EMI Electronics and the Cranfield Institute of Technology.

The Chinese minister will have discussions with Mr Smith and other ministers. His programme will cover many aspects of the British aviation industry including aircraft, aero-engines, research, development, production and management techniques, and training.



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Chairmen and Managing Directors

The following executives are seeking to further their careers within fields where proven experience counts and is rewarded accordingly

FINANCE

1. **Accountant.** BComm ACA. A positive and likeable man with international analysis and financial management experience especially in the brewing, banking and hotel industries. Location very flexible.
Age 26 Salary circa £8,000

2. **Corporate Planner.** BSc (Eng) MSc with Merchant Banking and financial services experience, particularly relating to acquisitions and investigations. Wishes to move to head office of major group. A good oarsman.
Age 29 Salary £9,000

3. **Finance Director.** ACCA. A mature and highly successful F/D of a manufacturing subsidiary (T.O. £5m) of a major industrial group. Promotion blockage, seeking greater responsibility and further career development.
Age 30 Salary £10,000+

4. **Treasurer/Foreign Exchange Manager.** A banking executive with four years experience in the Far East in cash management and foreign exchange. Seeking greater responsibility with a large international bank or industrial group – location very flexible.
Age 32 Salary £15,000 (UK)

5. **Finance Controller.** ACA J Dip MA. A successful financial manager with considerable company reconstruction experience in both the service and manufacturing industries. Promotion blockage and seeking further career development and greater responsibility.
Age 30 Salary circa £14,000

6. **Finance Director.** ACA BSc (business admin). His unusually wide knowledge includes industrial financial management, commodities and top level international financial consultancy. Wishes to further his career in industry.
Age 35 Salary £12,000

7. **Financial Controller.** ACMA. His strong technical cost accounting background includes computer auditing and developing new systems. Wishes to re-establish a UK career for family reasons after 10 years in Canada. Location flexible for career opportunity.
Age 35 Salary £10,000+

8. **Financial Manager.** ACCA ACMA ACIS. Highly intelligent with financial management and analytical experience in major international manufacturing groups and consultancies. Seeking further responsibility in line management.
Age 36 Salary £13,000+

9. **Group F/D.** ACCA. Good Italian. A particularly able senior executive with large diversified manufacturing group and service industry experience. Sound technical and practical experience of treasury and financial management systems.
Age 34 Salary £15,000

10. **Finance Director.** BA. Fluent German and French. His impressive career covers a wide range of manufactured products and services in a large international group. Seeks a UK base for family educational reasons.
Age 33 Salary circa £17,000

11. **International Financial Manager.** ACCA. Good French. Outstanding career in multiple and departmental store management (T.O. £160m). Imaginative, impressive and underpaid.
Age 47 Salary £12,500+

12. **Group Controller.** FCA. His wide international experience includes both manufacturing and retail distribution (500 outlets). A modest and likeable man seeking further career development.
Age 45 Salary £14,000+

MARKETING

13. **Sales Manager.** Highly successful young sales executive in fast-moving consumer goods and durables. Now seeks long term career development.
Age 29 Salary £9,000

14. **Export Area Manager.** BA (Hons). Fluent French. With a thorough understanding of export marketing matters, especially consumer products to Africa. Seeking greater responsibility in Europe and the developing countries.
Age 26 Salary £7,500

15. **Export Sales Manager.** Fluent German, French, Italian and Spanish. An impressive exporter covering a wide range of capital equipment and plastic products worldwide. A first class salesman seeking greater responsibility and a better product range.
Age 34 Salary £10,000

16. **Regional Manager.** BSc (Eng) 1st Class Hons M Inst Mkt. Fluent German some Russian, French and Italian. Experience covers engineering manufactured products such as pumps and mining equipment especially to German speaking area and Comecon. Seeking more enterprising company.
Age 46 Salary £14,000

17. **Marketing Manager.** Fluent German. A most impressive senior executive with excellent record in multinational container shipping company. A high flyer who wishes to develop his career further.
Age 29 Salary £20,000

18. **Commercial Manager.** BSc (Econ). With substantial experience of the building services industry including recruiting and activating a sales force and the provision of cleaning security and maintenance services. Has a good knowledge of business in both the Middle East and America.
Age 27 Salary £8,000

19. **Marketing Manager.** With impressive international experience in high technology products. has strong sales and some production experience in large international group. Seeks greater responsibility in new products or with a smaller company.
Age 37 Salary £14,000

20. **Commercial Manager.** BA (Mod Lang). Fluent French. A highly successful contract negotiator and commercial manager in mining, petrochemicals and mine engineering. Seeking greater responsibility.
Age 41 Salary £15,000

21. **Strategic Development Manager.** BSc (Econ). A professional economist closely involved with Agribusiness in the third world. Promotion blockage in major international group: seeking greater job satisfaction. Location flexible.
Age 47 Salary £12,000+

22. **Commercial Manager.** Sloan Fellowship. Good French and Arabic. Substantial company management experience in the Middle East and America especially in engineering, construction and consultancy. Tough and hardworking, location flexible.
Age 48 Salary £15,000

23. **European Manager.** Fluent French, Italian, Dutch and Spanish. A commodity trader with considerable experience of the meat and dairy industries in the EEC and Australasia. Seeking further career development.
Age 50 Salary circa $40,000

24. **Area General Manager.** Fluent French and German, good Italian, Spanish and Portuguese. A Swiss national. An engineer whose wide range covers packaging, electronics, consultancy and industrial component manufacture. Would like to develop the European division of an international manufacturing group.
Age 54 Salary £20,000

GENERAL MANAGEMENT

25. **General Manager.** An exceptionally able and likeable manager (T.O. £14m) with eight years experience covering all aspects of multiple retail store management. Properly ambitious, creative and entrepreneural. Seeking a further career opportunity.
Age 28 Salary circa £15,000

26. **Structural Engineer.** BSc Civil Eng. An intelligent young design and structural engineer with large project experience in the Gulf and in Nigeria. Wishes to continue to develop his career overseas.
Age 30 Salary £11,000

27. **General Manager.** ACA. Fluent French. An impressive international G/M with strong financial management and marketing experience especially in connection with shipping freight and transport problems. Having carried out successful company 'turn round' in two years now seeks fresh challenge.
Age 32 Salary £15,000

28. **General Manager.** MIGD. A comprehensive career in wholesale and retail has led to a unique and successful experience in Duty Free outlet management. Promotion and salary blockage and now seeking greater responsibility.
Age 43 Salary £14,000

29. **Admin Manager.** BSc (Physics) MBA. Fluent German, good French. Pilots licence helicopter and fixed wing. Considerable statistical and computer systems experience. Wishes to start a second career following 16 years regular army service.
Age 40 Salary £7,000+

30. **Supermarket Non-food Director.** With 20 years experience of the retail industry, Chain stores, shops, cash and carry, discount etc. Has successfully established new operations. Promotion blockage seeking greater responsibility.
Age 41 Salary £15,000

31. **Technical Manager.** PhD BSc M Inst P. Some French, Spanish and Dutch. Strong experience in most areas of high technology especially in value engineering and trouble shooting in manufacturing units. Promotion and salary blockage.
Age 42 Salary £10,000+

32. **Managing Director.** AIB. Some French and Dutch. His unusual career includes engineering, stock banking management (15 years) and financial and export services as well as property company management. Wishes to remain UK based.
Age 37 Salary circa £15,000

33. **Technical/Development Manager.** BSc (Eng) & (Elect) MI Mech E MIEE FRAeS. A General Manager with exceptional production experience in both high and low technology areas (Avionics, gas, steel plate) as well as IR and marketing. Promotion blockage and underpaid.
Age 51 Salary £12,000+

34. **Managing Director.** Fluent French, good German. The highly successful M/D of a prestigious high quality furnishing company with a very strong sales and marketing background in export and import retail. Fashion conscious with high level contracts world wide.
Age 38 Salary circa £15,000

35. **M/D International Trader.** With 12 years as Far East Area Manager for major group in pharmaceuticals and f.m.c.g. Recently set up a National Trading Company – now wishes to return to normal commerce.
Age 40 Salary circa $30,000

36. **Chief Executive.** BA (Oxon) PPE MBA Distinction. A most impressive executive with both substantial industrial production experience and City experience, especially in connection with mining, pipelines and industrial gases. Promotion blockage.
Age 43 Salary £15,000+

NOTES
(i) All the above executives have been interviewed by us and we consider them to be high quality material in their particular range – there are several others whom space precludes.

(ii) If you require an executive of similar capability please contact me.

(iii) If you yourself feel that you match these standards and might benefit from a new opportunity please contact us in the strictest confidence. There is absolutely no hidden obligation or registration fee: we feel that we have a mutual interest with you in discussing your future.

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Home news

BSC cuts half-year loss to £151m

British Steel Corporation lost £151 million, after paying £101 million interest, in the six months to 30 September 1978, the corporation announced on 30 November. This figure, BSC explained, reflects both the difficult market situation and the corporation's strenuous efforts to reduce its losses.

BSC chairman Sir Charles Villiers said that these losses must be eliminated, but pointed out that they were somewhat less than expected earlier in the year and showed a substantial climb out of the pit of the two previous half year's losses (£201 million and £241 million).

The reduction in loss was due partly to the major plant closures of the last 12 months, to the initiation of a radical programme of cost reduction, to new plant, and to improvements in manufacturing performance throughout BSC.

Sir Charles stressed that the action of management to contain and reduce BSC's losses would be continuous and would be carried out in consultation with workforce and unions. Nevertheless, further heavy losses could not be avoided in the second half of this year: assuming the continuation of present trading conditions, the corporation expected the loss for the full year to be in the range £300 million to £350 million (1977-78 – £433 million loss), subject to exchange gains or losses on foreign currency loans.

He explained that the higher figure provided some allowance for contingencies but the consequence of major disruptions at suppliers and customers works, together with any stoppage at BSC plants, could further significantly affect the result. The commercial outlook since the publication of 'Prospects for steel' in April this year had somewhat worsened and thus the objective of operating at a rate of break even by March 1980, set to management by the BSC board last April, had become harder.

However, the board and management believed that this objective must stand, as a major step on the corporation's 'Road to viability' and away from the huge losses of recent years.

From now on BSC would increasingly have the benefit of new plant and better products as a result of major investment, especially that completed at Llanwern, and at both Ravenscraig and Redcar, where major new facilities would be ready for commissioning next year. Further impact on BSC's losses must depend upon the reduction of costs and success in matching capacity more closely to demand, which had resulted in a reduction in BSC's labour force by 16 000 over the last 12 months.

The reduction in losses, the improving performance, the joint consultation with unions and workforce did provide somewhat firmer ground. However, it remained 'essential that the country as a whole should understand the problem and support the remedies' including the inevitability of change as BSC adjusted to the increasingly competitive stance required for the 1980s.

The corporation did not see any improvement in market conditions in the immediate future, the trends in the UK automobile, shipbuilding and some other steel consuming industries were unhelpful to steel sales; the level of customers' trade competitiveness, and output would depend largely on the outcome of the current wage round. The upward pressure on BSC's own costs would continue.

BSC's Llanwern steel works.

Shipping bill: warning of bigger fines . . .

The government intends to increase the fine on summary conviction for breaches of the traffic separation scheme in British waters, Parliamentary Under-Secretary of State for Trade Stanley Clinton Davis told the House of Commons on 27 November.

Winding up the wide-ranging debate on oil spillage, the first debate to consider the problem since the *Torrey Canyon*, *Eleni V* and *Christos Bitas* incidents, Mr Clinton Davis said that although the Merchant Shipping Bill as published (see next page) made no mention of this, the government intended to introduce an amendment at a later stage to increase this fine very substantially. The present sum of £100 was grossly inadequate, he said.

The question of standard salvage procedures was also under review, he continued. This needed to be done in the international sense and it was currently being studied by the legal committee of the Intergovernmental Maritime Consultative Organisation (Imco).

On the question of compensation, he told the house that, unfortunately, the government had not succeeded in convincing major oil importers recently that the total sum of £19½ million available for compensation under the 1971 international fund convention, should be doubled. He hoped it would be possible to do so in the future.

Turning to the international dimension, particularly the problem of operational discharges, which are related to the need to clean cargo tankers, he said that the acceptance of the latest technique of that sort, crude oil washing, was a major success at the February conference of Imco.

Many other important measures had also been agreed upon at that conference, he added. These included: segregation of cargo and ballast tanks on new tankers; protective location of the ballast tanks to reduce risk of outflow in the event of a collision or grounding; much wider use of inert gas systems to reduce the risk of explosion, especially in tank cleaning; duplicated elements in steering gears; more frequent inspection of tankers; and in the area of navigational safety, second radars and the development of collision avoidance aids.

The Merchant Shipping Bill would enable the UK to ratify these and other important international agreements concerning maritime safety and pollution prevention

He told the house that Imco had set new target dates for ratification and implementation of these proposals. 'Admittedly, for this particular area these are as far ahead as 1981. Of course it is necessary to get the international shipping community to recognise that these things have taken place. It needs a certain amount of expenditure. But fixing a target date is an advance over what has happened before.'

He said the government would do its best to set an example to other nations by early ratification.

. . . and laws to implement safety and pollution requirements

An amendment which will give the UK powers to implement the requirements of international conventions on safety and pollution as soon as the UK has ratified them will be introduced into the Merchant Shipping Bill, which had a second reading in the commons on 30 November.

Opening the debate, Secretary of State for Trade John Smith explained that if the international entry into force of present or future agreements proved unacceptably protracted the UK would be able, if appropriate, to bring these agreements into effect in relation to both UK ships and foreign ships which called at British ports.

Outlining the main points of the bill, Mr Smith pointed out that it gave very wide powers to promote safety and health on UK registered ships and included the strengthening of powers of inspectors in discharging their tasks of enforcing the regulations. In recognition of its breadth of powers, the bill included a statutory requirement to consult those affected before making regulations or giving approvals.

On pilotage, Mr Smither said that the provisions in the bill were the culmination of a lengthy period of review involving pilots shipowners, and others involved in pilotage. The bill modernised pilotage legislation in a number of ways, in particular the general organisation of pilotage and the requirements for compulsory pilotage. In this context, Mr Smith mentioned that Treasury ministers had agreed that legislation would be included in the 1979 Finance Bill which would enable the present status of the pilots national pension fund to continue.

On discipline and casualty inquiries, Mr Smith said that discipline at sea and the related problem of drinking aboard fishing vessels were covered by clauses 23 to 25 of the bill. These would put in effect changes recommended by working groups which required statutory backing. Mr Smith emphasised that the provisions represented an extremely important step in implementing an enlightened disciplinary regime, much more in line with the developments elsewhere and firmly focused on the primary object of ensuring the safety of UK ships and those on board.

Important measures to enhance the commercial position of the UK's fleet were also contained in the bill, Mr Smith continued. Successive governments had encouraged the development of a comprehensive UK offshore capability not only to meet the demands of operators in the North Sea, but to compete for a share of the worldwide market in offshore supplies. The powers in the bill to control foreign takeover would extend to such undertakings.

The bill also amended the provisions within the Merchant Shipping Act 1974 which would clarify and improve the government's defensive powers against certain types of foreign shipping activity. It would also enable the UK to ratify two important international conventions concerned with the liability of shipowners.

Clause 36, he continued, contained measures to remove the right of shipowners to limit their liability for the death or injury of crew members. Clause 40 contained provisions to make the earnings of merchant seamen attachable in respect of maintenance orders.

Finally Mr Smith foreshadowed an amendment to revise virtually all the penalties in the merchant shipping legislation and in particular to apply a maximum penalty of £50,000 on summary conviction for the most serious safety offences.

Oil-spill dispersants

'The concentrate dispersants currently licensed under the Dumping at Sea Act 1974 for use in the waters off the United Kingdom work effectively over a wide range of, but not all types of oil, and their toxicity, and hence their effect on marine life, is very much less harmful than earlier products. The scale of the research and development programme on methods of dealing with oil spills is under review' – Stanley Clinton Davis, Parliamentary Under-Secretary of State, Department of Trade, answering a question in parliament on 1 December.

Energy Commission studies manpower requirements

UK energy industries, which together employ about 650 000 people, do not in general foresee major problems in the period up to 1985 to 1990. But some, however, foresee difficulties in recruiting people with certain technical skills in this period.

This is one of the conclusions of a report on the manpower requirements of the energy industries commissioned by the Energy Commission and prepared by the Department of Employment. The report, which was published on 15 November, was considered by the Energy Commission on 1 December.

At its first meeting the Energy Commission considered a working document on energy policy, since published as a green paper, which reviewed the potential development of coal, gas, oil and nuclear energy and the part that the different fuels and more efficient use might play in meeting Britain's future energy needs. This new paper – ('Manpower requirements of the energy industries' Energy Commission paper 18, available free from the Library, Department of Energy, Thames House South, Millbank, SW1, tel. 01-211 3394) – was commissioned to enable members of the Energy Commission to consider the manpower implications of these developments and how far, if at all, manpower constraints might affect the orderly and successful exploitation of UK energy resources.

Tris-treated children's nightwear banned

Supply of Tris-treated children's nightwear has been banned by an order signed on 30 November by John Fraser, Minister of State for Prices and Consumer Protection, on account of the carcinogenic hazard it presents.

'Tris', for which the chemical name is Tris (2,3-dibromopropyl) phosphate, has been used in the United States to make children's nightwear flame-resistant so as to comply with the regulations in force in that country. Following research which showed that Tris could be carcinogenic if ingested or absorbed through the skin, the Consumer Product Safety Commission in the United States indicated that Tris-treated children's garments were banned products under the Federal Hazardous Substances Act, and sale of these garments ceased in the USA. More recently, the commission has expressed its intention to seek an injunction to stop the export of such garments but, in the meantime, it would seem that substantial quantities have already been exported.

It is known that Tris-treated children's nightwear, mainly pyjamas and nightdresses, has been imported into France and that the French authorities have now banned the marketing of these garments. Their re-export cannot however yet be prohibited under French legislation. It is therefore possible that the garments will be re-exported to other countries – including the United Kingdom. A consignment was in fact despatched to this country by a French exporter on 10 November.

In these circumstances, the minister of state decided to take action under section 3 of the Consumer Safety Act 1978 (which was brought into force on 1 November) by making a prohibition order banning the supply in the United Kingdom of Tris-treated children's nightdresses, pyjamas and dressing-gowns. The order came into effect on 1 December and is of 12 months' duration. Within this period it will be considered whether the safety regulations should be made permanent.

Anyone supplying Tris-treated garments of the specified kinds in the course of a business, including manufacturers, importers, wholesalers and retailers, will be liable to prosecution.

Tris-treated garments of American origin will be made of acrylic polyester, acetate or tricetate fabrics and are likely to be labelled 'made in USA' and may bear the marking LA3 or GPU. Any garment from which a label has obviously been removed should be treated with suspicion.

As far as the department is aware, Tris-treated fabrics have not been used by manu-

facturers of children's nightdresses and pyjamas in the UK.

It is understood that the amount of the chemical present in any garment becomes substantially diminished after a few washings.

Cooling-off period for life assurance buyers

There is to be a 10-day cooling off period for people taking out many kinds of life assurance policy. Companies will have to send purchasers of their policies a notice reminding them of the obligations they are entering into and advising them of this cooling-off period.

These are the effects of regulations laid before parliament by Stanley Clinton Davis, Parliamentary Under-Secretary of State for Companies, Aviation and Shipping, on 5 September and published on 29 November.

The regulations, which will come into force on 1 January 1980, prescribe the form and contents of a 'statutory notice' which an insurer entering into many kinds of life assurance contracts will be required to send to the proposer. They will also automatically activate from that date the provisions of the Insurance Companies Act 1974 that give the recipient of the notice a 10-day cooling-off period during which he may cancel the contract.

Different forms of notice are required for ordinary life contracts and for linked life business, but whichever is used a notice of cancellation which may be used to terminate the contract must be attached to the form.

The contents of the statutory notices have been made as simple and as short as possible while focussing the recipient's attention on the main features of the contract being entered into, partly by explanation and partly by posing questions that should be considered. The notices highlight such points as: the amount and frequency of the premiums which the policyholder is undertaking to pay; the benefits provided by the policy; the surrender rights to which a policyholder may be entitled if he discontinues the payment of premiums; in the case of linked policies, the fact that the assets to which the benefits are related do not belong to the policyholder.

A contact point for inquiries is given in the notice should the proposer need further information about the contract.

Copies of the new regulations, 'The insurance companies (notice of long-term policy) regulations 1978, (SI 1978 no. 1304)', can be obtained from government bookshops or through booksellers at 25p net each, or by post from HMSO, PO Box 569, London SE1 9NM, price 32p net each.

'Don't worry, Sir, the assurance company foots the bill, providing you wear the suit during the cooling-off period.'

Resale Prices Act: alleged infringements

Concern about the scale of alleged infringements of the Resale Prices Act was expressed in the House of Commons on 30 November by John Fraser, Minister of State for Prices and Consumer Protection.

Replying to a parliamentary question, Mr Fraser said he was very concerned at the scale of the allegations.

'It is for the Director General of Fair Trading to investigate allegations of breaches of the Resale Prices Act,' he said. 'I understand that he has already begun investigations to see whether there is sufficient evidence to justify recommending that proceedings be taken on behalf of the Crown against one or more of the suppliers concerned, for contravention of the provisions of the act. I also understand that proceedings by the Crown under the act are being considered in another case.'

The Resale Prices Act 1976 prevents manufacturers and other suppliers imposing minimum prices at which goods are to be resold and makes it unlawful to enforce such prices by witholding supplies from, or discriminating against, dealers who do not observe them. Aggrieved parties or the Director General of Fair Trading may take proceedings in the courts against offenders.

Double pricing of beds prohibited

Double pricing by retailers and the use of recommended resale prices in the sale of beds are to be prohibited.

The Indication of Prices (Beds) Order 1978 containing these provisions was laid before parliament on 30 November by Roy Hattersley, Secretary of State for Prices and Consumer Protection, and will come into effect on 1 March 1979.

The order gives effect to the advice of the Price Commission in its report on the pricing of beds and follows consultation with interested parties after the secretary of state's announcement on 30 October, when he indicated provisional acceptance of the commission's recommendations.

Subject to certain exceptions, dual pricing in the retail sale of beds is prohibited; a retailer of beds thus may not claim unrealistic discounts from the price he never intended to charge. But the order does not prohibit the display of more than one price where these can be related to prices previously charged by the retailer or where different circumstances applying to the transaction are identified.

The prohibition on most forms of dual pricing by retailers is coupled with a ban on the recommending of resale prices by manufacturers and wholesalers, thus strengthening its provisions.

In concluding his consideration of the report, Mr Hattersley welcomed the action that the trade was voluntarily taking on training staff, providing improved information to the consumer, and identifying 'consultants' employed by manufacturers in retail outlets. He noted that these had all been aspects associated with the sale of beds to which the Price Commission had drawn attention. Discussions with the trade had shown a commitment to act in this area through the voluntary code of practice for furniture.

Bigger consumer voice in nationalised industries?

Chairmen of consumer councils may be offered a seat on the boards of nationalised industries.

This is one of the major questions to be considered by a sub-committee on 'consumers and the nationalised industries' set up by the House of Commons select committee on nationalised industries.

The Queen's speech at the beginning of the parliamentary session announced there would be legislation to strengthen the consumer voice in relation to the nationalised industries.

The select committee's last major investigation into the role of the consumers was in 1970-71 when it published its report 'Nationalised industries' relations with the public'.

Since then the National Consumer Council has published a report 'Consumers and the nationalised industries'. The March 1978 white paper on the nationalised industries (Cmnd 7131) included the government's reply to points raised in the NCC report.

The sub-committee intends to invite written submissions from the industries themselves, trade unions, the official nationalised industry consumer councils, as well as from the National Consumer Council and any other consumer organisations affected by the nationalised industries.

The sub-committee, which has invited the submission of short written papers before 1 February 1979, will be considering in particular whether chairmen of consumer councils should be represented on nationalised industries' boards, and the effectiveness of existing consumer representation in the nationalised industries.

Public sessions of oral evidence will be held in the House of Commons in the new year. The sub-committee will invite the Secretary of State for Prices and Consumer Protection to give evidence.

Membership of the sub-committee is Sir Donald Kaberry (chairman), Russell Kerr (ex officio), R. E. Bean, Neil Carmichael, Giles Shaw, John Spence, Mike Thomas.

Information can be obtained from the clerks to the sub-committee – L. C. Lawrence Smyth and C. J. Poyser, tel. 01-219 3268. Written inquiries or memoranda should be sent to the Clerks to Sub-Committee D, Select Committee on Nationalised Industries, Committee

Office, House of Commons, London SW1A 0AA.

Last session's sub-committee B of the select committee conducted pre-legislative hearings on the draft Electricity Bill (Cmnd 7134). The draft bill included a proposal to give statutory authority to the Electricity Consumers' Council. It is expected that a revised Electricity Bill will be introduced later this session. The ninth report on reorganising the electricity supply industry was generally welcomed as giving all parties affected by legislation an opportunity to put their views directly to parliament and the public.

Rank-Xerox gives undertakings on commercial policy

Rank Xerox (UK) has given a number of undertakings to Roy Hattersley, Secretary of State for Prices and Consumer Protection, following suggestions and recommendations in a recent report by the Monopolies and Mergers Commission.

Replying to a parliamentary question on 1 December, John Fraser, Minister of State for Prices and Consumer Protection, explained that the undertakings were the outcome of discussions with the company carried out by the Director General of Fair Trading at the request of the secretary of state. They related to patents, the company's policy on the rental and sale of machines, the supply of toner (a printing agent), copy bureaux and the group pricing plan (GPP), and could be summarised as follows:

Patent licensees. Rank Xerox would provide the director general with a list of licensees of its UK patents and those of Rank Xerox Ltd and Xerox Corporation relating to reprographic machines.

Rental and sales policy. Rank Xerox would, subject to minor exceptions, make all types of machines and accessories generally available for rental also available for sale and would fix sale prices so that purchasing was a financially attractive alternative to renting for a reasonable proportion (expected to be at least 10 per cent) of acquisitions of each type of machine.

Toner. The company would give customers on the GPP the option of purchasing separately toner already available to other customers and make provision for the terms on which this might be done.

Copy bureaux. Rank-Xerox would prominently display their price lists and require them to stand on their own feet commercially.

GPP. Rank Xerox would inform the director general in advance of any proposed changes to the GPP terms or charges or of any other discount or pricing arrangement that it proposed to introduce and that involved aggregation of more than one machine.

The undertakings provided for the supply of information by Rank Xerox to the director general to enable him to monitor the performance and effects of the undertakings and to make an annual review.

The report by the Monopolies and Mergers Commission, 'Indirect electrostatic reprographic equipment', was published on 16 December (HMSO, £2.10).

Thermos allowed interim price increases

Thermos Ltd has been allowed increases equivalent to a weighted average of 5.33 per cent over a range of products, the Price Commission announced on 27 November. The increases on individual items will vary up to a maximum of 15p on some of the larger flasks.

The Price Commission announced on 9 October an investigation into the prices of vacuum flasks and other vacuum ware manufactured and sold by Thermos. The immediate effect of the commission's decision to investigate is that the company may not increase its prices during the period of the investigation. Subsequent representations by Thermos were considered and the commission exercised its discretion to allow interim increases. The investigation is due to be completed by 5 January next year.

Essex garages promise better conduct

A director of two Essex garages has promised Gordon Borrie, Director General of Fair Trading, that in future the garages will not break their contracts with consumers by supplying cars which are falsely described.

Terence Clemence, director and secretary of Lanmere Ltd, Eastern Road, Romford, and of T and J Motors Ltd, High Road, Chadwell Heath, Barking, has given assurances of future good behaviour towards car buyers under the Fair Trading Act.

T and J Motors and Lanmere have been convicted of 16 offences under the Trade Descriptions Act between October 1975 and September 1978 at the Chelmsford crown court and the Stratford and Barking magistrates' courts. Thirteen of the convictions were for selling cars with incorrect mileage readings.

Airline chiefs to study future of trans-Atlantic routes

Presidents and senior executives of 13 major trans-Atlantic airlines are meeting in London on 13 December to discuss the profitable expansion of travel on the USA-to-Britain air routes.

Gateway '79 – a one-day conference organised by the British Tourist Authority – will also examine ways of providing and maintaining the best possible reception and welcome facilities for travellers arriving at British airports and journeying around the country.

Giving news of the conference, BTA explained that Britain had long been the most popular overseas destination for American travellers, receiving twice as many US visitors each year as any other European country. Moreover, London was the world's leading intercontinental gateway. Britain's national tourist organisation, the BTA, had a direct responsibility to maintain the country's pre-eminent position in the US travel market. This year nearly two million Americans will have visited Britain.

Gateway '79 will be opened by Stanley Clinton Davis, Parliamentary Under-Secretary of State for Companies, Aviation and Shipping. Speakers will include Lewis Roberts, BTA director of marketing in north America; Ray Colegate, group director of economic service, Civil Aviation Authority; Dan Colussy, president of Pan American World Airways; and Richard Brew, deputy leader of the Greater London Council.

Repeat order for British Aerospace 748

Liat, the Caribbean airline, has placed a further repeat order with British Aerospace for another HS 748. This will increase Liat's fleet of 748s to six aircraft.

The new 44-seat 748 series 2A aircraft has been prepared in record time and will join the airline in time to operate at the pre-Christmas traffic peak.

Based in Antigua in the Leeward Islands, Liat operates an island-hopping service throughout the Caribbean. The varied airfields and short-stage lengths, in some cases only 10 minutes' flying time, demand a rugged and reliable aircraft.

Liat's first 748, delivered in 1965, has completed over 26 000 flying hours and more than 55 000 landings.

Also Trinidad and Tobago Air Services has placed a further order for two more 748 aircraft to increase its fleet to six. The new aircraft will be in 48-seat configuration.

BAe says that the government of Trinidad and Tobago has come in for high praise for the acquisition of the 748s which form part of the government's programme to boost scheduled air transport between Trinidad and Tobago and charters between these two islands and other parts of the Caribbean.

Automated assistance for Prestwick oceanic area control centre

The Civil Aviation Authority has placed a contract worth nearly £3 million with Software Sciences Ltd for the supply of a data processing system for the oceanic area control centre at Prestwick controlling air traffic in the eastern part of the north Atlantic.

The new system, which is due to come into operation in early 1982, will help controllers to provide a more efficient service and to cope with the expected increase in air traffic across the Atlantic.

The centre (in conjunction with the Canadian oceanic centre at Gander, Newfoundland) sets up twice daily a series of predetermined tracks across the north Atlantic. The tracks are calculated to provide the shortest journey time taking account of forecast weather. As the routes lie over water, radar coverage is not available and progress reported by aircraft is monitored at the centre using arrays of paper flight progress strips which have the data on

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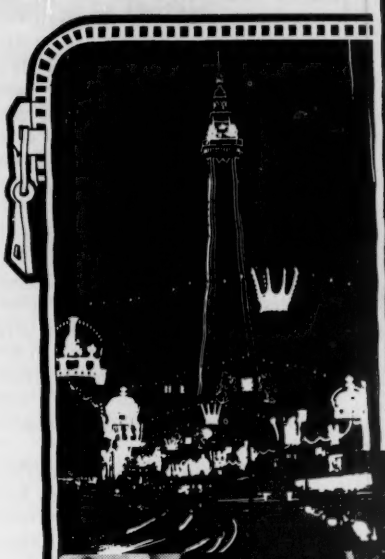

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individual flights needed for non-radar control. Currently at Prestwick computer assistance is confined to printing the strips, exchanging a limited amount of data with the centre at Gander, and calculation of estimated elapsed flight times along the tracks.

The most important change in the new system will be the electronic display of flight data which will replace paper strips.

Saray Electronics gives undertaking to court

Gordon Borrie, Director General of Fair Trading, announced on 22 November that he has obtained a court undertaking from a London chain of shops selling radios, televisions and hi-fi equipment on the basis of 175 consumer complaints, nine county court judgments and two convictions under the Trade Descriptions Act.

The undertaking, given by Saray Electronics (London) Ltd and its director, Mr Vashi Gulabrai Tulsiani in the Bloomsbury and Marylebone County Court, was sought by the director general because the company had refused to give assurances of better behaviour to consumers under part III of the Fair Trading Act until court proceedings were commenced.

The undertaking binds Saray Electronics (London) Ltd not to continue its past conduct to consumers or to engage in a similar course of conduct in the future.

PO opens overseas business service

A new business communications service, which allows people in Britain to make low-cost telephone calls to selected firms in other countries, was announced by the Post Office on 16 November.

It is an international call transfer facility which enables UK phone users to contact overseas firms simply by dialling a London number. Calls are re-directed automatically over the international telephone network, at no extra cost to the callers.

For businesses based in other countries, the new service offers a phone number in Britain without the need of on-the-spot representation. It also means their UK customers can get in touch without having to pay for an international call.

A trial of the call transfer service is being launched by Post Office Telecommunications in co-operation with Service 800 SA, a private company registered in Switzerland, which will be responsible for marketing the facility. Service 800's first customers are an international hotel group which has a central reservations office in Brussels, an investment banker based in New York, and a stockbroker with offices in Geneva.

The service uses the normal inland and international telephone networks, and special Service 800 call transfer equipment installed at a Post Office exchange in London.

'T & I' index inquiries

Readers wanting to know when articles and items of information were published in *Trade and Industry* should consult the published indexes which are issued free to subscribers. For material published in recent months, inquiries of this kind can be made to the Department of Industry Library's indexing section, tel. 01-215 5842 or 01-215 5879.

Official appointments

Gas consumers' council. Secretary of State for Prices and Consumer Protection Roy Hattersley has appointed Councillor P. Deegan as a member of the Scottish Gas Consumers' Council until 30 May 1981.

Secretary of State for Prices and Consumer Protection Roy Hattersley has appointed Mrs Caroline Footman, Michael Rendell and Michael Geddes as members of the Southern Gas Consumers' Council until 31 August 1981.

Electricity Consultative Council. Secretary of State for Prices and Consumer Protection Roy Hattersley has appointed Councillor Thomas Joseph Lyons as a member of the Merseyside and North Wales Electricity Consultative Council until 31 March 1981.

Secretary of State for Prices and Consumer Protection Roy Hattersley has appointed Mrs P. Sluce, Cllr F. McGrath, Mr B. Wright, Cllr B. Graham and Dr N. Burrow as members of the North Western Electricity Consultative Council until 31 May 1981.

Monopolies and Mergers Commission. Secretary of State for Prices and Consumer Protection Roy Hattersley has appointed Mr R. G. Smethurst as a new part-time member of the Monopolies and Mergers Commission from 1 December 1978 to 30 June 1981.

Government factories

Moving in

Forshaw Marine Ltd, has occupied advance factory terrace unit premises of about 300 m² built by the English Industrial Estates Corporation on the department's Rock Ferry Estate, Birkenhead, Merseyside.

The company manufactures boat trailers and components and requires the larger premises to cope with expanding work loads. It is expected that with the expansion it will be able to increase employment over the next couple of years.

P. Simpson and Co Ltd has occupied terrace unit premises of 450 m² built by the English Industrial Estates Corporation in Bradford Road, Batley. The company already occupies premises in Batley where it supplies all types of machine tools. The company has an excellent order book especially from the overseas market, and confidently expects to employ 21 people, 13 additional, by the end of the second year.

AP Valves is to occupy terrace unit premises of 225 m² built by the English Industrial Estates Corporation for the Development Commission at Helston, Cornwall.

AP Valves occupies premises of 1500 sq ft in Coventry where it manufactures life jackets. The company is keen to increase productivity and manufacturing facilities for additional associated equipment, mainly skin-diving equipment and components. The company expects to employ more additional people over the next couple of years.

Ulapalm has occupied a factory of about 2250 m² built by the English Industrial Estates Corporation on the Department of Industry's Knowsley industrial estate in the Merseyside special development area. The company, whose headquarters is in Kent, will use the premises for the manufacture of ladies clothing and expects to employ some 200 people as production is built up over the next year or two.

Tuck Tape Ltd is to occupy a 2250 m² advance factory built by the English Industrial Estates Corporation on the department's site at Gillmoss, Liverpool in the Merseyside special development area. The company manufactures self-adhesive tape and carries out government contract work. It requires these new larger premises because of a planned expansion programme. The company expects to employ up to 50 additional staff over the next couple of years.

Work started

Work has started on seven advance factories for the Department of Industry at Riverside Park, Middlesbrough.

The factories are all of the terrace unit type, totalling 27 individual units. Three are 1300 m² and each one is divisible into four equal units. Two are 540 m² and each one is divisible into four equal units. One is 2160 m² and is divisible into four equal units. One is 1950 m² and is divisible into three equal units. The premises should be ready for occupation in October next year.

Inquiries regarding purchase or lease should be addressed to Regional Director, Department of Industry, Northern Region, Stanegate House, Groat Market, Newcastle upon Tyne NE1 1YN, tel. 0632 24722.

Government help for first-time home buyers

A government scheme to help first-time home buyers was launched on 30 November by Peter Shore, Secretary of State for the Environment.

The 'Homeloan' scheme will make it easier for first-time purchasers to buy their own homes, by helping to build up the necessary deposit.

For the first time, direct government help is being given:

- ☐ A loan, interest-free for up to five years, to be added to the normal mortgage loan.
- ☐ A cash bonus of up to £110.

Almost all the large building societies, banks, and trustee savings banks are operating savings schemes which will qualify. Savings in

Investing in Britain

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the National Savings Bank, the National Giro, and Save As You Earn will also be eligible.

Accounts can be opened from the age of 16, enabling people to join the scheme as soon as they start work. If they are continuing their education, they – or their parents on their behalf – can still make a start putting their money in. To qualify, participants must save for at least two years. One year before applying for benefits, they will need £300 in their account. By the time they apply, at the end of the second year, they will need £600.

When they buy a home, with a mortgage loan, they will get an additional £600 loan, and a bonus. If they have more than £300 in their account for the last 12 months they can qualify for higher bonuses. Even if they cannot manage £600 by the time they apply, they may still get a bonus.

The loan and bonus together are worth about 5 per cent of the average price being paid by first-time buyers. For many, the benefits will help greatly with the deposit which has to be found. The interest-free loan itself is worth over £4.30 a month at present interest rates.

Guidance for small firms in Oxford

A one-day 'clinic' for small businesses is to be held in Oxford during December. Organised by the Small Firms Information Centre, Luton, the clinic will be held at the Jobcentre, 28-31 St Ebbes, Oxford, on 12 December from 09.00 to 17.00 hours.

Terry Gibbon, Small Firms Information Centre manager, said: 'We want to make Oxford and district businessmen aware that we are their regional contact point.' He explained that the centre had an excellent free service to offer small firms but many of them might not know of it. The centre could answer questions on starting a business, raising finance, finding a way round government departments or where to locate a source of supply. The centre also acted as a sort of signposting service, pointing businessmen in the right direction.

Mr Gibbon added that many firms in the area might not be aware that a small firms counselling service had recently been started in Oxford with the assistance of Mr K. Reed, president of the Oxford and District Chamber of Commerce. The service, available to all small firms in Oxfordshire, aimed to enable owners and managers of small firms to discuss their problems confidentially with experienced businessmen used to facing similar situations themselves.

Counsellors running the service offer advice on a wide range of subjects including finance, productivity, stock control and expansion. To make an appointment to see a counsellor, telephone Freephone 372.

More effective competition recommended for sales of jeans

Retailers are called upon to compete more effectively by cutting their gross profit percentage margins on jeans in a Price Commission report on prices, costs and margins in the distribution of jeans, carried out under the Price Commission Act 1977, published on 30 November.

The commission also says in its report that the wide variation in the price of jeans is not an accurate reflection of quality. The trade is urged to provide a system of labelling to help purchasers judge the main features of quality such as cloth weight and washing performance.

Roy Hattersley, Secretary of State for Prices and Consumer Protection, is considering the report and will be consulting interested parties about its findings.

Consumer Credit Act 1974: agreements secured on land to be exempt

Under section 16(1) of the Consumer Credit Act 1974, the Secretary of State for Prices and Consumer Protection may by order exempt from the greater part of the controls imposed by the act certain consumer credit agreements which are secured on land where the creditor is named in an order.

The Consumer Credit (Exempt Agreements) (Amendment 2) Order 1978, (SI 1616, 8 December), HMSO, will come into force on 18 December 1978. The new order amends the schedule to the Consumer Credit (Exempt Agreements) Order 1977 (SI 1977 326) by including three insurance companies, one friendly society and one body corporate named in the public general act. They are:

Insurance companies: Ansvar Insurance Company Ltd, Municipal Life Assurance Ltd, Municipal Mutual Insurance Ltd.

Friendly society: Brunel Assurance Society.

Body corporate: Scottish Special Housing Association. Agreements of a description falling within section 16(2) of the act, being agreements for which the Secretary of State for Scotland may make advances to the Scottish Special Housing Association in terms of paragraph (f) of section 25(1) of the Housing (Financial Provisions) (Scotland) Act 1968 as inserted by the Housing (Financial Provisions) (Scotland) Act 1978.

Further orders are expected to be made under section 16(1) as circumstances warrant. Submissions for exemption may be submitted by any organisation falling within section 16(1) of the Consumer Credit Act 1974, being an insurance company, friendly society, an organisation of employers or organisation of workers, a charity, a land improvement company or a body corporate named or specifically referred to in any public general act.

Further information can be obtained from Miss P. J. Rankin, CCC2 (Consumer Credit Branch), Department of Prices and Consumer Protection, Room 2602, Millbank Tower, Millbank, London SW1P 4QU, tel. 01-211 6026.

Clearance of merger proposals

Roy Hattersley, Secretary of State for Prices and Consumer Protection, has decided, on the information at present before him, not to refer the following mergers to the Monopolies and Mergers Commission under the provisions of the Fair Trading Act 1973:

Vantona Group Ltd/J. Compton, Sons and Webb (Holdings) Ltd.

International Timber Corporation Ltd/Bambergers Ltd.

N. V. Beleggingsmaatschappij Wereldhave/Midhurst White Holdings Lts.

The acquisition by The Argus Press Holdings Ltd of Tridant Group Printers Ltd.

Government sales

20 and 21 December 1978 – Miscellaneous

Location:
Post House Hotel, Herbert Walker Avenue, Southampton.

Auctioneers:
Austin and Wyatt (Dept L), 79 High Street, Fareham, Hants (0329 234211).

Stores lying in south central England including clothing and textiles, furniture, binoculars, coal and coke, electrical and MT spares, hand and machine tools, racking, paint, scaffolding, trailers, tyres, forklift trucks, tractor and vehicles.

9 January 1979 – Miscellaneous

Location:
Ordnance Storage and Disposal Depot, Ruddington, Notts.

Auctioneers: Arnold and Son (Dept L), 13 Market Place, Burton-on-Trent, Staffs (0283 64657).

Aircraft components and ground equipment, electonic spares, furniture, textiles, tyres, machine tools, binoculars, watches, photographic equipment, searchlights, MT spares, generators, forklift trucks and many other items.

Catalogues, which give details of the lots, conditions of sale, viewing times etc, are available from the auctioneer from two weeks before and up to the day of the sale, price 40p, postage 15p.

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Supplementary estimates: £2 bn increase

Supplementary estimates published on 30 November seek the authority of parliament for increases of £2,109 million in certain votes above the level previously approved for them.

All additions to public expenditure are being met from the contingency reserve or offset by savings elsewhere, and will thus be contained within the planned total for 1978-79 in the last public expenditure white paper (Cmnd 7049).

There are three main reasons for which such supplementary estimates are required. First, the forecasts of revenue and expenditure and the cash limits published at the time of the budget in the financial statement and budget report take account of the extent to which pay and prices are expected to rise during the course of the year. The main estimates, however, are customarily based on the levels of pay and prices ruling at the time when they are prepared. Parliament is asked to authorise in supplementary estimates further sums which the government proposes to spend as a result of subsequent pay and price increases. Of the £2,109 million, £1,394 million is on account of pay and price increases not provided for in main estimates.

Secondly, some of the expenditure in the supplementary estimates represents transactions within the public sector of a kind requiring parliamentary authority; others are offsets to revenue. These payments do not add to public expenditure, but any increases require supplementary estimates. On this occasion, £247 million is required for this purpose, £120 million of which is in respect of a transfer to the Northern Ireland Consolidated Fund, and a further £70 million is a payment to the National Insurance Fund.

Third, provision may also be made in the supplementary estimates for increases in the volume of public expenditure. This accounts for the remaining £468 million of the total of £2,109 million in these estimates.

The estimates now presented bring the total of estimates presented so far to £46,291 million. This total is greater than the £46,178 million of total supply expenditure, including provision for pay and price increases, published in the FSBR. However, these totals are not entirely comparable, because in presenting supplementary estimates for particular votes, no account is taken of possible savings on those votes for which no provision is required. Primarily for these reasons, the amount actually spent during the year tends to fall significantly short of the total of main estimates plus all supplementary estimates (including any further supplementary estimates which may still be presented).

Supply services and cash limits

The greater part of expenditure on supply services is subject to cash limits. The relevant estimates provisions are within the announced cash limits. The total provision sought in respect of expenditure falling within the central government cash limits (together with allowance for any non-voted expenditure in these cash limits) is £28,680 million. To this must be added estimates provision for Northern Ireland departments which is made by order in council. With this included, the total provision sought to date is £29,780 million. Thus estimates provision is now 98½ per cent of the announced cash limits. At this stage last year, estimates provision was 96½ per cent of the announced cash limits.

Expenditure in the first half-year

In the first half of 1978-79, issues to government departments (excluding Northern Ireland departments) for expenditure on supply services totalled £21,689 million. That was an increase of 15 per cent over similar issues in the first six months of 1977-78 and was in line with the expected increase of 15 per cent for the year as a whole.

Profiles of the expected quarterly pattern of spending prepared early in the year suggested that 47 per cent of the cash limits would have been spent in the first half of the financial year. In fact, the half-year expenditure represents 46 per cent of the cash limits. At the end of the first half of 1977-78, when the profiles had suggested that 47 per cent would have been spent, expenditure on cash limited items amounted to 45½ per cent of the cash limits.

Industry needs good designers – Huckfield

The importance of manufacturing industry in the UK having access to good designers cannot be underestimated. Les Huckfield Parliamentary Under-Secretary at the Department of Industry, made this point at a prize giving for the Design Council/GEC schools design prize in London on 23 November.

The United Kingdom had a good record in designing imaginative products which had often been at the very forefront of technological progress he emphasised. There were two key tasks: not only must it be ensured that young people continued to train for careers in designing but also it must ensure that good designs could be turned into successful products by British manufacturing industry.

Mr Huckfield went on to say that the competition made a valuable contribution to promoting understanding and interest in manufacturing among teachers, who had found something in it to stimulate the creative energies of their pupils. It was part of the increasing effort being made up and down the country to bring education and industry closer together so that young people entering the job market were fully aware of the importance and attractions of manufacturing industry.

He pointed out that with his department's industry/education unit, he was encouraging more local initiatives through local conferences and meetings and he was giving pump-priming financial support to help get practical action taken more quickly. The national climate for industry/education co-operation had improved significantly over the past two years. He said that he was particularly pleased to see the increasing popularity of design as a school subject; between 1972 and 1977 the number of people taking craft and design 'O' levels, 'A' levels and CSEs had increased by 72 per cent, 75 per cent, and 100 per cent respectively.

Investing in Britain

This week's review of investment in the UK by British and overseas firms covers companies from the United States, an American-Dutch firm and, on the home front, investment by British companies in the north and midlands.

'We can't run away from technology – Williams

A £3.5 million factory investment in Berwick-upon-Tweed for the Polychrome Corporation of New York was recently opened by Alan Williams, Minister of State for Industry. The 30 000 sq ft advance factory will initially employ 55 people on the site at East Ord, Berwick.

Mr Williams said the development, which will produce 1.5 million m² of plates in the first year, fitted into the Industrial Strategy because 65 per cent of its output would be exported and it would eventually contribute £2 million a year to Britain's balance of payments.

Polychrome will manufacture offset printing plates and eventually hopes to employ 150 people. Mr Williams said, referring to criticism of duplication of effort and lack of co-operation between the various regional agencies, 'I am glad that you have given a testimonial to local and central government,' to Gregory Halpern, founder, of the Polychrome Corporation. Mr Halpern had previously paid tribute to the co-operation of the Department of Industry, English Industrial Estates Corporation and Berwick and Northumberland local authorities.

Polychrome has received regional aid and an award under the sectoral printing industry scheme. 'This project is based on the latest technology in the industry. Some people think we can turn our backs and run away from new technology and somehow at the same time preserve jobs. We have to be in the front of technology or eventually we go out of the market altogether', the minister said.

Rexham continues expansion

In 1967, the Riegel Paper Corporation of the USA formed a joint venture with Brittains Paper of Leek, Staffordshire, with a new 20 000 sq ft plant at Wrexham, north Wales, to manufacture word tape for IBM in Scotland and metallic yarns for the European textile industry.

As market requirements changed, the Brittains-Riegel joint venture turned to making flexible laminates and coatings for custom engineering applications and in 1978 the American Rexham Corporation, which grew out of Riegel Paper, gained full ownership of the joint venture and the name was changed to Rexham (UK). The plant at Wrexham, a former coal mining area, has doubled in size since 1969 and now employs 110 workers. The plant has twice been extended and, although the latest expansion took place only this year, the company is already looking forward to its next expansion. Managing director D. W. S. Hazelton explained that all the money for new investment had been internally generated, and that the company had grown in every year, with the exception of 1973-74. 'Our ambition is to double turnover in the next two years,' he added.

Rexham (UK)'s laminates are used in the printed circuit, automotive, graphics, pharmaceutical industries and in a large variety of ways in many different industries. Half of all production is exported, on average, and the company is also heavily involved in exports as a supplier to other companies with overseas markets.

New technology for cable specialists

Brand Rex, the American-Dutch electronic cable specialist, is planning to increase its factory space and workforce at Glenrothes new town, in order to introduce a new technology to Scotland.

The development was announced at Glenrothes recently by Kingman Brewster, United States ambassador, who indicated that Brand Rex hopes to corner a share of a £38 million-a-year market in Europe meeting military and defence requirements and the needs of modern railway systems.

The ambassador spent the day in Glenrothes which has one of the most important concentrations of US industrial development in the UK said that Brand Rex would begin later this year to extend its premises at the Viewfield industrial estate by 30 000 sq ft bringing its total plant to close on 100 000 sq ft. Part of the new extension will house £500,000 to £600,000 worth of equipment devoted to a new technology for Scotland that will make tougher cable insulation. It is hoped that the new project will create 20 jobs over the next 18 months.

Gram refrigeration for Birds Eye expansion

Refrigeration equipment, valued at almost £300,000, is being supplied and installed, at the Birds Eye factory in Kirkby (Lancs) by Gram Refrigeration (GB) Ltd of Kent. The contract includes all associated pipework, thermal insulation and electric control panel and wiring for the equipment.

The equipment will serve a cooked foods freezing plant, and includes three spiral freezing tunnels and three plate frosters not in Gram supply. Under a separate £31,000 contract placed by Sir Alfred McAlpine, the main contractor for the building project, Gram will also fabricate and instal interconnecting pipework to the refrigeration evaporators on this process plant.

News for inclusion in 'Investing in Britain' should be addressed to: The Editor (Investing in Britain), Trade and Industry, Eighth floor, 1 Victoria Street, London SW1H 0ET.
Advertisers who wish to be associated with the feature should contact Terry Day on 01-242 9478 (or, in the north, Alan Loftus on 061-766 2191).

Aycliffe attracts more industries

Six hundred new jobs were created in Aycliffe, Co. Durham, over the last year with employment in industry reaching a record 10 100, the Aycliffe Development Corporation announced recently.

Over the year, 14 new companies moved in and plans are under way to take advantage of the growing interest in the town by increasing the range of advance factories available.

Passing the 10 000 jobs mark had been something of a milestone for Aycliffe Development Corporation, director of estates Tony Cooper, pointed out. Factory space had been increased by 50 per cent from 3 million sq ft to 4.5 million; the number of companies had risen from 72 to 96 and employment was up from 8800 to 10 100. In the last year alone there had been more than 600 new jobs.

Aycliffe's success has come from the attraction of new companies as a result of extensive promotion in the United States, Scandinavia, Germany and in the UK and by the expansion of existing industry.

Prominent on the list of newcomers is Electrolux, which moved in two years ago with 270 jobs in a purpose-built 170 000 sq ft factory. Eaton Axles, Union Carbide, Flymo, Perstorp Warerite, British Industrial Plastics and Ozalid have all expanded or are expanding in the area.

Computing group reorganises for growth

To take advantage of changes taking place in the computer services industry and to increase customer service potential throughout the country, Midlands-based Computer Resources Group has implemented fundamental changes in its corporate structure.

The former constituent companies of the group – CRL Abacus, CRL Bureau Services, Recruitment Resources and Facilities Management – have been reorganised into companies identified as Computer Resources but each providing a clearly defined service: systems and programming, bureau services, turnkey systems, software products, recruitment, and contracts.

At the same time the group has developed its national and regional grouping so that each of the services can be offered on a national basis. From each of the operating centres in London, Coventry, Wilmslow, Bolton, Leeds and Ossett, clients can obtain the whole range of services offered.

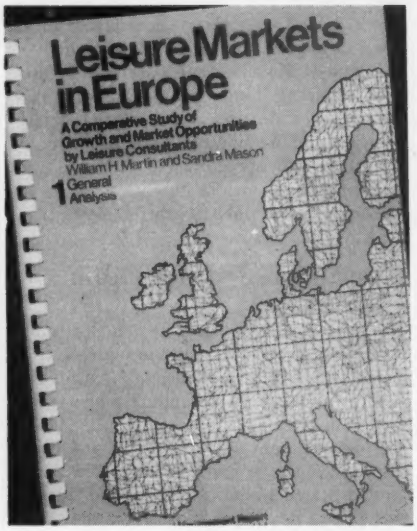
Computer Resources Group has its headquarters in new premises in Coventry and has also taken over a new office development at Thorndike House, Bell Street, London. The group employs 170 and is expected to have a £4 million turnover in 1979 following its reorganisation.

New publications

Leisure in Europe

Increased opportunities for leisure invariably accompany general increases in wealth. And this has certainly been the drift in western Europe in recent years. By 1975, 20 per cent of all consumer spending in this part of the world was directed towards leisure goods and services.

This trend is meticulously and exhaustively examined in 'Leisure markets of Europe', a study designed to provide comprehensive data on the growth and future potential of leisure markets in 14 European countries. These include the EEC, Scandinavia, Switzerland, Austria, Spain and Finland. The first of the three volumes presents a general analysis of the survey's scope and a comparative background view of the markets under consideration. There is a great deal of homogeneity in the types of leisure activities pursued throughout Europe, but the authors are careful to avoid making any false deductions and in the two succeeding volumes they explore each national market in some depth. Covering a wide range of activities, from the most popular, like watching television or drinking alcohol, to those hobbies that have a more limited appeal, the authors show the differences in emphasis and popularity.


Leisure Markets in Europe
A Comparative Study of Growth and Market Opportunities by Leisure Consultants
William H Martin and Sandra Mason
1 General Analysis

The difficulty of collecting strictly comparable statistics from 14 countries can never be overcome entirely, but the authors have mitigated the problems by their eminently clear and concise presentation of the facts. The most thought-provoking sections of the study deal with future prospects. Considerable comment has been excited by the probability that vastly increased leisure-time will become available in the near future, whether voluntarily sought or enforced, and it is refreshing and valuable to have a contribution that not only sets out rationally to consider major influential elements like economic performance, changes in population and advances in technology, but which also places its forecasts within a well-defined and well-documented context.

The report makes a valuable contribution in a subject area that is rapidly growing in significance and it should prove important for those already involved in, or considering entering, the leisure markets in this country or elsewhere in Europe.

Leisure markets in Europe: a comparative study of growth and market opportunities, by William H. Martin and Sandra Mason. Volume I, General analysis; volume II, United Kingdom, Ireland, Denmark, Norway, Sweden, Finland, Germany (Federal Republic); volume III, Netherlands, Belgium, France, Switzerland, Austria, Italy, Spain. Financial Times, Business Publishing Division. 1978 Three volumes; ringbound £175.00 (ISBN 0 903 199 08 4).

Read all about it

Bibliographies not only provide labour-saving access to a literature, they can, when compiled by well-informed experts, offer a useful first approach to a new subject. Such is the first volume of a new bibliography on regional problems and policies in the European community edited by Kevin Allen.

His method is to bind together in hard covers a series of separately paged country bibliographies, each with its own introductory essay and index. This first volume covers West Germany (by far the longest section), Italy and the UK (the shortest). The second, we are told, will cover the remaining community countries.

The approach is a scholarly one, and references are included regardless of the language in which they are written. The source of the bibliographies is the International Institute of Management in Berlin – a spin-off from the work of a small team working on regional incentives in the EEC countries. An attempt has been made to be up to date, and this, together with the way the entries are arranged in simple but specific subject areas, even if fairly selective, makes them easy to use. For the newcomer, the foreword to each country bibliography (14 pages for that on Germany – in English) will be of value in getting into the literature quickly and easily.

Regional problems and policies in the European community: a bibliography. Volume I – Federal Republic of Germany, Italy, United Kingdom. General editor Kevin Allen. Saxon House, 1978. 336 pages. £25.00 (ISBN 0 566 00229 9).

Community facts and people

For those involved either directly or indirectly with the functioning of Europe's institutions, two directories have recently been published to provide quick-reference information. One is the enlarged and updated second edition of the 'European communities yearbook', the other is the first edition of the 'European communities who's who'.

The first contains a wealth of information on all aspects of community work, while the 'Who's who' offers detailed data on leading community personnel. Listed in conjunction, the two publications are encyclopaedias on such diverse topics as the Lomé convention, outlining the EEC's relationship with developing countries, Eurocontrol, the organisation for the safety of air navigation, and the European parliament.

Written in French and English both publi-

Desk research on the EEC

Trade and economic statistics from almost every country in the world, including a comprehensive European collection, are available for reference in the Statistics and Market Intelligence Library at Export House, 50 Ludgate Hill, London EC4M 7HU, tel. 01-248 5757 ext. 368/369, telex 886143 (DTI Export LDN). A modern well-equipped library of over 100 000 volumes, it has a public reading room equipped with microfiche readers and photocopying facilities. Among the documents available are foreign trade directories covering all Europe (as well as individual European countries), and selected trade fair catalogues.

The library is open from 09.00 to 1730, Monday to Friday (last passes for the building are issued at 17.15).

Departmental publications not sold through HMSO

This list includes material issued by the Departments of Industry, Trade, Prices and Consumer Protection, and Energy; the Monopolies and Mergers Commission; the Office of Fair Trading, and the Price Commission which was notified to the compiler during November.

Department of Industry

Young engineer for Britain '79. 1978. [15 pages.] Department of Industry, Room 314, Ashdown House, 123 Victoria Street, London SW1E 6RB.

Committee for Industrial Technologies

CFIT newsletter. No. 16. October 1978. 8 pages. Department of Industry, Room 520, Ashdown House, 123 Victoria Street, London SW1E 6RB.

Committee for Materials Handling

Materials handling: information and advice. 1978. 12 pages. Department of Industry, Room 525, Ashdown House, 123 Victoria Street, London SW1E 6RB.

Committee on Corrosion

Controlling corrosion: no. 3, Economics. 1978. 12 pages. Department of Industry, Room 520, Ashdown House, 123 Victoria Street, London SW1E 6RB.

EEC Information Unit

EEC: this is your business. 1, How it works. [Part 1 of a 3 part 'Trade and Industry' guide to the European communities, published as a supplement with 24 November 1978 issue.] 24 pages.
Available separately from Trade and Industry, Eighth Floor, 1 Victoria Street, London SW1H 0ET (Price 40p per part or £1. for the three supplements.)

Overseas Technical Information Unit

Science and technology abroad. French government assistance for industrial research and development, by J. E. C. Macrae. (FRA 148). September 1978. 14 pages. Department of Industry, Overseas Technical Information Unit, Abell House, John Islip Street, London SW1P 4LN.

Research and Technology Requirements and Perspectives Division

The Garment and Allied Industries Requirements Board. 1978. 1 folded sheet. Department of Industry, Research and Technology Requirements and Perspectives Division, Room 409, Abell House, John Islip Street, London SW1P 4LN.

Technology Reports Centre

R & D Abstracts. Issue 78, no. 5, September-October 1978. Supplement for official use only. 57 pages.
Available to UK government organisations only, from Department of Industry, Technology Reports Centre, Station Square House, St Mary Cray, Orpington, Kent BR5 3RF.

R & D Abstracts. Vol. 38, no. 9, 1 November 1978. Available on annual subscription of £42 from Department of Industry, Technology Reports Centre, Station Square House, St Mary Cray, Orpington, Kent BR5 3RF; free to government departments and certain other official bodies.

Department of Trade

Christos Bitas. The fight at sea against pollution. 1978. 36 pages. Department of Trade, Marine Library, Room G7, Sunley House, 90 High Holborn, London WC1V 6LP.

Accidents Investigation Branch

AIB Bulletin. No. 11/78. 20 November 1978. 12 pages. Department of Trade, Accidents Investigation Branch, Room 401, Kingsgate House, 66-74 Victoria Street, London SW1E 6SJ.

British Overseas Trade Board

BOTB news. No. 3, October/November 1978. 12 pages. British Overseas Trade Board, Publications Sales Unit, Export House, 50 Ludgate Hill, London EC4M 7HU.

A foundation course in overseas trade. 1977. [Reprinted 1978.] 8 pages. Department of Trade, Export Development Division 3, Room 403, 1 Victoria Street, London SW1H 0ET.

Hints to businessmen series (price £1 + 20p p & p each).
Bahrain and Qatar. 1978-79. 88 pages.
Cyprus. 1978-79. 52 pages.
France. 1978-79. 76 pages.
India. 1978-79. 64 pages.
Iran. 1978-79. 76 pages.
Japan. 1978-79. 68 pages.
Malawi. 1978-79. 48 pages.
Mexico. 1978-79. 64 pages.
Tunisia. 1978-79. 44 pages.
Union of Soviet Socialist Republics. 1978-79. 84 pages.
Available from: BOTB, Publications Sales Unit, Export House, 50 Ludgate Hill, London EC4M 7HU.

Department of Prices and Consumer Protection

Metrology, Quality Assurance and Standards Division

International Organisation of Legal Metrology. International recommendation no. 28: technical regulations for non-automatic weighing machines. Official translation into English made by the United Kingdom government. 1978. [70 pages.] £5.70. Department of Industry, Technology Reports Centre, Station Square House, St Mary Cray, Orpington, Kent BR5 3RF.

The role of standards in the Industrial Strategy. Proceedings of the conference held at Church House, Great Smith Street, Westminster, London SW1A 2NB on Wednesday, 17 May 1978. 1978. 153 pages. Department of Prices and Consumer Protection, Metrology, Quality Assurance and Standards Division, Room 446, Abell House, John Islip Street, London SW1P 4LN.

Departments of Industry, Trade and Prices and Consumer Protection

Common Services Libraries

Office of Fair Trading Library. 1978. 1 folded sheet. Office of Fair Trading Library, Room 501, Field House, Breams Buildings, London EC4 1PR.

Regional policy and development: a select list of books available in the North Western Regional Office Library. 1978. 9 pages. For official use only. Department of Industry, Abell House Library, John Islip Street, London SW1P 4LN.

Trade directories – United Kingdom and overseas: a list of directories available in the North West Regional Office Library. 2nd ed. 1978. 20 pages. For official use only. Department of Industry, Abell House Library, John Islip Street, London SW1P 4LN.

Department of Energy

The dairy industry. Energy audit series no. 3. Issued jointly by the Department of Energy and the Department of Industry. 1978. 65 pages. Department of Energy Library, Room 1020, Thames House South, Millbank, London SW1P 4QJ.

Advisory Council on Energy Conservation

Summary and conclusions by the transport working group as the outcome of the public discussion of ACEC Paper No. 5 – Road vehicle and engine design: short and medium term energy considerations. 1978. 5 pages. Department of Energy, Energy Conservation Division, Room 1675, Thames House South, Millbank, London SW1P 4QJ.

Energy Commission

Papers
17. Exploration and development of UK continental shelf oil. [Paper by the UK Offshore Operators Association Limited.] 1978. 19 pages + annex.
18. Manpower requirements of the energy industries. Paper by the Department of Employment. [1978.] 59 pages.
19. Offshore oil policy. Note by the Department of Energy. [1978.] 12 pages.
20. UK oil and natural gas depletion. Paper by Michael Barnes, chairman, Electricity Consumers' Council, Naomi McIntosh, chairman, National Gas Consumers' Council and David Tench, chairman, Domestic Coal Consumers' Council. 1978. 4 pages.
The above Energy Commission papers are available (single copies only) from: Department of Energy Library, Room 1020, Thames House South, Millbank, London SW1P 4QJ.

Office of Fair Trading

Review of the UK self-regulatory system of advertising control. A report by the Director General of Fair Trading. November 1978. 46 pages + appendices. Office of Fair Trading, Room 112, Field House, Breams Buildings, London EC4 1PR.

Departmental items published by HMSO are listed in the free catalogue 'Trade, industry, energy, prices and consumer protection' (sectional list no. 3) available on written application from HMSO, PO Box 569, London SE1 9NH or to personal callers at any government bookshops.

Documenting Europe

Although the UK has been a member of the EEC since 1973, it is strange that there should still be a need for general guides to the official cations provide for those who may at times be confused by official publications. Both are useful guides to the complexities of the European organisation.

European communities yearbook: and other European organisations. Editions Delta, available in UK from Bowker, Erasmus House, Epping, Essex CM16 4BU. 1978. 700 pages; paperback £12.00 (ISBN 2 8029 0001 3).
European communities who's who: and other European organisations. Editions Delta, available in the UK from Bowker, 1978. 293 pages; £25.00 (ISBN 2 8029 0000 5).

community publications. With his 'Guide to the official publications of the European communities', John Jeffries attempts to satisfy that need.

His introduction offers an outline of the community history, its institutions and legislative machinery, the work of the Official Publications Office and the function of European documentation centres.

Documents are arranged by their originating institution or section. Included are the general publications, including treaties and the *Official Journal*, plus commission publications listed under broad subject headings. The entry for each item indicates the language(s) and dates of publication, and gives a brief guide to contents except where the title makes this self-explanatory. The guide also contains a list of EEC abbreviations and acronyms; a chapter on available bibiliographic aids; appendices providing addresses for ordering publications; and a list, by country, of European documentation centres and depository libraries throughout the world.

The work has two major defects. First, the bibliographical information rarely extends beyond 1975 so that, in some areas, the book is two to three years out of date. Second, the guide is not exhaustive and some important publications are not mentioned – for example, commercial publications on community matters, and scientific publications, in particular, are described only in broad outline.

A guide to the official publications of the European communities, by John Jeffries Mansell, 1978. xii, 178 pages. £10.00 (ISBN 0 7201 0633 8).

Technology news

Government responds to the challenge of microelectronics

Microelectronics technology could generate as many new jobs as it displaces. Opening the design engineering show and conference in Birmingham on 4 December, Secretary of State for Industry Eric Varley said that he believed that far more jobs were at risk through loss of Britain's share of international markets. He expressed the government's view on the new technology that Britain had to be up with the leaders on the application side and at least maintain a reasonable capability in manufacturing and supplying microelectronic devices. The government's response to the challenge of microelectronics was presented to the National Economic Development Council on Wednesday. We publish extracts below from the memorandum, presented jointly by the Secretaries of State for Industry, Employment, and Education and Science, which discusses the employment and social implications of the new technology, the manufacture of electronic components and the application of microelectronics.

Employment and social implications

Microelectronics is a new technology. There will be parallels between its effects and those encountered historically during the introduction of other new technologies, though it is likely to make itself felt more widely. Almost all forms of technological change create opportunities for reducing the use of one or more factors of production; and the public debate on the impact of microelectronics has concentrated so far on its effects on employment.

There is a spectrum of opinion in the debate about employment. At one extreme, the optimists have looked at the economy as a whole, and have observed that on past experience those sectors and indeed countries that have had the best record on innovation and productivity growth have also achieved the highest growth in employment as well as output. The increase in productivity which microelectronics is expected to bring should therefore increase rather than decrease employment.

At the other extreme the most pessimistic commentators have tended to examine individual sectors of the economy or occupations which are particularly vulnerable and have then extrapolated from the loss of employment which has either been experienced in these (for example, in the Swiss watch industry), or is predicted for them to the economy as a whole.

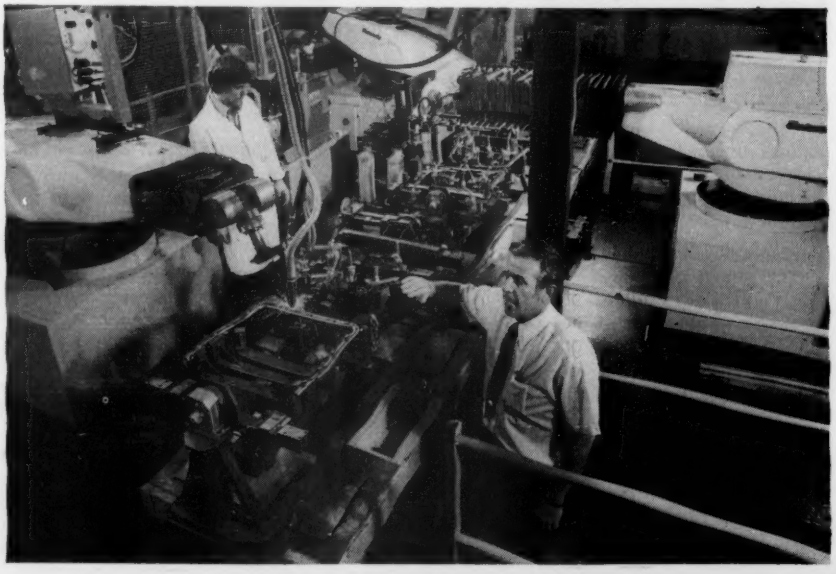
But there is an implicit assumption in these pessimistic predictions that the job-creating influences which in previous technological advances have at least offset any job displacement effects will cease to operate. In looking at the overall effect on employment any analysis must take account of the effect of foreign competition and job creation and displacement.

Employment in the UK will be very strongly affected by how far UK firms keep abreast of their overseas competitors. Substantially more jobs are at risk through loss of markets than through productivity increases. The manufacturer who is first in the field with an improved product will be able to create new employment through higher levels of output. Our success or failure in adopting the new technology at least as fast and effectively as our competitors is likely to be the biggest single factor in the impact of microelectronics on employment.

There will be a mix of job creation and job displacement effects. Jobs will be created in the production of silicon chips and in software systems and applications – both strategically important though relatively minor in terms of numbers. Early replacement of plant and machinery with new equipment incorporating microelectronics will create extra jobs in the capital goods industries provided they can beat the competition from imports. In both manufacturing industry and services there will be job displacement effects where microelectronics accelerates automation, though quality and reliability, as well as productivity, will be reasons for introducing the technology. In some cases the effect will be substantial and occasionally sudden.

There will be job creation effects where microelectronics makes possible entirely new products. Alongside these various effects, and interacting with them, will be indirect effects relating to the aggregate level of demand in the economy. Products and ser-

Being checked out prior to shipment to Italy, this robot automated spot and arc-welding installation was designed and built by Unimation (Europe) Ltd to weld up to 600 car-seat frames a day. The system, comprising three Unimate 2000 robots with associated electronics and conveyor line, can be programmed to weld components for seven different types of car seats.



vices will become cheaper, resulting in increased demand for those products and services and releasing spending power for higher consumption of other goods and services though there will be some particular sectors which will be adversely affected. How far these effects lead to increased employment will depend on the competitiveness of our industries with imports.

The balance between job creation and displacement effects will depend, in particular, on the speed of change and mobility of resources. The rate at which the effects of microelectronics come through will differ between sectors. For example, those sectors directly subject to foreign competition might be expected to respond particularly quickly. The impact on the economy and total employment will therefore be staggered. A great deal will depend on the willingness of industry to invest in the new technology and of people to acquire new skills and to change jobs.

At the Prime Minister's request, the Central Policy Review Staff (the think tank) has been co-ordinating studies within Whitehall of the social and employment effects of microelectronics; the Department of Employment has also established a special unit to study employment effects. The main conclusions to emerge from this work so far, and on which the government would welcome comments, are:

☐ microelectronics can have both job displacement and job creation effects. It is difficult to make quantitative predictions of the balance between them, though some have attempted to do so. Evidence from examining individual cases of applications suggests that these early attempts should be treated sceptically. There need certainly be no presumption that the overall effect is likely to be additional unemployment in the long term

☐ more jobs will be available if we maintain our competitiveness than if we fall behind

☐ during the period of adjustment, which may well be prolonged, the labour force in particular firms will change substantially, both in terms of numbers and in the mix of skills required. In some cases, though not in all, this may exceed what can be dealt with by normal turnover of employment. The onus will then be on both sides of industry and on the government to manage this process efficiently by providing adequate protection, compensation and incentive for those affected by the need for job and skill mobility, and by directing part of the gains from increased productivity into securing an adequate supply of training and retraining facilities.

The central policy review staff is also studying the other social effects of microelectronics. Many of these, though not all, will be beneficial. For example, there will be improvements in the quality of work, especially in higher safety standards and reduction of dirty work; there will also be opportunities for reductions in boring and repetitive work, though there may also be some de-skilling. In the home, there should be opportunities for improvements in the convenience of domestic appliances, for energy conservation, and for increased security. In leisure and entertainment, some of the first fruits of microelectronics are already available to the consumer, and they are unlikely to be the last.

In education, health care and other public services, microelectronics is likely to make available factilites which have hitherto been impracticable or uneconomic. Among the most important effects are likely to be those arising from changes in the pattern of communications, notably post and telecommunications services, transport and broadcasting These are likely to bring scope for greater flexibility in the way public services are made available, wider use of communications media for entertainment and study, and freedom for more people to choose to work from home. Decisions to apply microelectronics will have to be made by individual firms and undertakings and in response to consumers' preferences.

The microelectronics industry

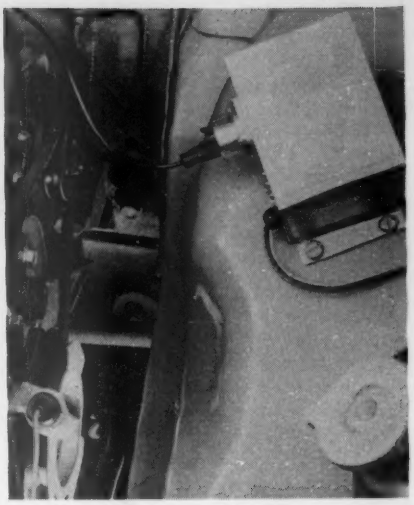
The UK already has a significant stake in the microelectronics industry. Government support has helped to maintain a high technological competence in UK-owned firms like Plessey, Ferranti and GEC and has encouraged foreign-owned companies to invest in microelectronics production in the UK.

A major UK presence in the microelectronics industry may not seem to be a prerequisite of the application of microelectronics throughout the economy; it would be open to us to import all our components, which are not themselves of very high value. But the government does not accept this approach. In this fast-changing technology total reliance on overseas suppliers could put our users at a disadvantage compared with the user industries in the home country of the supplier. This is true even for the most standard of microelectronic products and, for those which are more specialised, close collaboration between user and supplier is absolutely essential.

The technical competence of our user industry will also be greatly enhanced by the technology transfer which an indigenous supply industry will provide. Without such an industry, therefore, we could find ourselves not just importing the relatively low value microelectronic components but much of the equipment into which these components are built. The government's strategy for the industry aims to create in the UK:

☐ a production capability for the very high volume technically advanced products of the future which will have major overseas and home markets. The £50 million National Enterprise Board's Inmos project is directed to this end, but there is room for, and encouragement will be given to, inward investment by the established multinational companies, either on their own or in collaboration with UK-owned companies (such as, for example, the recently announced GEC/Fairchild proposal for the establishment of high volume production of memories and microprocessors);

☐ a capability to provide user companies with special microelectronics products and with the essential research, development, design and test services to which they will need ready access. This will be based largely on



This electronic car-ignition control system being developed by Hughes Microelectronics Ltd of Glenrothes with BL cars, measures crankshaft positions and speeds, inlet manifold pressures and cylinder temperatures, and relates them to the demands of the engine to produce each spark at exactly the right moment. Trials of the system are underway in a six-cylinder Princess car.

Social and employment implications of microelectronics technology

The major changes in industry over the next 15 years from the application of microelectronics technology will not necessarily be on the numbers employed but on the organisational structure and product range. This is a conclusion reached by the Central Policy Review Staff in a paper presented to NEDC on Wednesday which summarises its examination so far of the employment and social consequences of microelectronics technology.

Case studies in manufacturing industries looked at by the CPRS, 'the government's think-tank,' indicate that the changes have generally taken the form of reduction in stock levels, savings in raw materials and energy, improvements in quality and reliability and better information for control or the solution of technical problems. On the service industry side microelectronics applications have led to possibilities for new and improved services. While the changes may have restrained labour employment there is no evidence of significant job losses.

The employment creating potential of microelectronics technology is dependent, says the CPRS, on the UK not falling behind its competitors in seizing the opportunities presented.

While the social effects of the new technology will require further study, the CPRS paper envisages significant and far reaching changes in social structure towards the end of the next 15 years. Public access to readily available and decentralised information sources will change the relationship between the individual and government, location of work places and attitudes towards acquiring knowledge and use of leisure.

Up to 10 blender pumps on a self-service petrol station forecourt can be controlled by this kiosk control unit and ticket printer of the Ferranti Autocourt fuel dispensing system. A microprocessor in the control unit decodes and stores information from the forecourt, calculates discounts, maintains cumulative totals and controls the operation of date output printer.

UK-owned firms or those multinational companies which demonstrate a willingness to invest here and to become committed to the UK user industries;

□ an infrastructure industry in support of these two capabilities. This industry will supply specialised production equipment, materials technology and computer aided design and test facilities and will also be able to export to the rest of the world.

To achieve these objectives the government extended its support for the microelectronics industry when it announced, in July, its microelectronics industry support programme (Misp) (*Trade and Industry*, 28 July, page 174). The programme, which is a continuation of support given over a number of years, aims at providing £70 million of support. This is intended to attract a total investment of over £200 million (not including the NEB's investment of £50 million in Inmos) into the industry.

Application of microelectronics

It is in the area of microelectronic applications that the government sees the need for the widest ranging and greatest effort. This new technology has been the subject of widespread public discussion, an important contribution to which has been the recently published report of the Advisory Council for Applied Research and Development (Acard) on the applications of semiconductor technology. But despite the publicity surrounding its development, the government believes that there is still considerable scope in many parts of British industry for increasing awareness of the potential for application of microelectronic technology.

It is important to move quickly to apply this new technology, and as a first step the government announced in July the interim microprocessor applications project (MAP) to which an initial allocation of £15 million was made (*Trade and Industry*, 7 July, page 2). In view of the rapid take-up of MAP assistance during the early months of the scheme, the government is increasing the funds allocated to the scheme to £55 million.

Awareness

The government has also considered the need for an effective programme to increase awareness not only in industry, but amongst the future working population who are at present being educated. The Secretary of State for Industry announced in October government measures aimed at creating a higher degree of awareness of the potential for applying microelectronics. They included the appointment of consultants by his department to work with the National Computing Centre on setting up a three-year national campaign and programme of seminars; seeking the help of the sector working parties in assessing the needs and identifying the action necessary in their sectors; and action to increase awareness within government departments (*Trade and Industry*, 10 November, page 269).

The government will work closely with the National Economic Development Council, sector working parties and economic development committees, the Trades Union Congress, and the Confederation of British Industry, the education service and others on the awareness campaign and it aims to involve some 500 000 key decision-makers over the next three years or so. The National Computing Centre made its first presentation to SWPs and EDCs in November. The Department of Industry is considering making special presentations to firms in key sectors where our competitors have gained ground because of more rapid and extensive microprocessor application. The cost of this part of the awareness programme is likely to be of the order of £10 million.

In addition, existing facilities under MAP are now being extended. Refunds of part of the cost of attending awareness (and training) courses are available under MAP. But present limits do not reflect the cost to firms if employees are absent on longer courses. The upper limit on assistance with costs of attendance at courses is therefore to be raised. As service sector firms are likely to play an important part in the diffusion of microprocessor technology, MAP assistance for attendance at training courses is also to be made available to employees of service sector firms. Course organisers will also be helped to finance their start-up costs.

Training

Shortage of suitably skilled people could be a major constraint on rapid adaptation to microelectronic technology. New applications of microprocessors will increase the demand for software skills. New industrial and consumer products incorporating microprocessors will require engineers and technicians with a working knowledge of the servicing side. The government is determined to ensure that skill shortages are not a major constraint on adaptation to the technology and is planning accordingly.

A sizeable effort is already going into training in this field, for example in courses being run in polytechnics and in colleges of further education. The Manpower Services Commission has put in hand a major programme to ensure that the training system immediately expands its effort in areas of known shortage – software skills for example – and gears itself up so that it is able to respond quickly to new demands which may not

Microprocessor application project

Progress at 31 October

Part A: awareness and training. Potential departmental commitment through National Computing Centre for external contractors on a draw-off basis, £3 million (maximum) over three years.
Training courses and seminars approved
By department direct: 5, MAP support £61,000
Through NCC: 10, MAP support £100,000

Part B: consultancy and feasibility, via Warren Springs Laboratory.
Clients:
Applications accepted and offered: 38, MAP support £73,000
Applications under consideration: 5, MAP support £10,000
Total potential: 43, MAP support £83,000
Further applications at the detailed inquiry stage: 36
Consultants:
On authorised list: 187
Under consideration: 63

Part C: project support:
Formal applications received to date: 101
Project value: £14.7 million
Potential MAP support: £4.2 million

Immediately show themselves. This training programme has four main aims: to ensure that industrial training boards and other training bodies are aware of the training implications of microelectronics for their industries; to ensure that continuing identification of training needs in industry takes full account of microelectronics developments; to ensure that training courses of the right kind are available in adequate numbers to meet needs; and to step up the output of trained personnel, by encouraging attendance at courses.

As an immediate interim contribution to removing the shortage of skilled people on the software side the commission is, in conjunction with industrial training boards and educational interests, developing existing training courses to produce a scheme to increase the intake of trained programmers and systems analysts by autumn 1979. The proposed interim increase will be approximately 3000.

In part this effort on the training and retraining side will be made through the commission's own schemes. In Tops, for instance, a major effort will be made to ensure that people with the appropriate ability, whether unemployed or currently working in other occupations, are given the opportunity to retrain in skills relevant to the microprocessor revolution. But a major part of the responsibility for ensuring that skill shortages are not a significant constraint will fall on the industrial training boards.

The government is also supporting under MAP training courses provided by hardware manufacturers, software houses, consultants and educational bodies. The government believes that this form of support is likely to achieve quick results. Direct Department of Industry support to firms and education institutions will therefore continue for the present, in close consultation with the Manpower Services Commission and the industrial training boards.

Government assistance to industry

Microprocessor applications project
The project aims to encourage UK industry to apply microprocessor technology to a wide range of products and production processes through ☐ support for appropriate training courses having national coverage ☐ up to £2,000 grant towards the cost of consultancy work ☐ grants towards development projects of up to 25 per cent of qualifying costs, or a shared cost contract arrangement under which government contributes up to 50 per cent of qualifying costs.

Microelectronics industry support programme
A programme designed to assist development and manufacture of 'specials', to encourage the manufacture of selected standard products, and to increase microelectronics exports and import substitution. Assistance is available in the form of ☐ cost-shared contracts, normally up to 50 per cent, for research projects ☐ up to 25 per cent or, in certain circumstances, cost-shared contracts of up to 50 per cent for development of products and processes ☐ grants of up to 25 per cent for investment in production plant, equipment and building.

Product and process development scheme
While the emphasis of the scheme is on mechanical and electrical engineering, all sectors of industry are eligible for assistance with projects involving the design, development and launching of new products or production processes; or, where more appropriate, a development programme embracing a number of interrelated products and/or processes. Assistance can take the form of ☐ a grant of up to 25 per cent of qualifying costs, or ☐ a shared contract involving government contribution of up to 50 per cent of qualifying costs in return for a levy on commercial sales.

Investment incentive scheme for the UK instrumentation and automation industry
Assistance under this scheme is available as ☐ a capital grant of up to 20 per cent of net eligible costs of equipment, plant and machinery ☐ a capital grant of up to 15 per cent of net eligible costs on new buildings, extensions or modifications to buildings.

Further information on these assistance schemes is available from Electronic Applications Division, Department of Industry, Dean Bradley House, 52 Horseferry Road, London SW1P 2AG, tel. 01-212 0839.

Literature
'Microelectronics: the new technology', a Department of Industry booklet available free of charge from the Electronic Applications Division at the above address.

'The applications of semiconductor technology', a paper by the Advisory Council for Applied Research and Development (Acard), available from HMSO and government bookshops, price 85p.

Design engineering conference papers are available from Design Engineering Conference Secretariat, Monks Hill, Tilford, Farnham, Surrey GU10 2AJ, tel. Runfold 2066/3111, telex 858623. The complete conference papers are priced at £40. Individual session papers, price on application.

Education

Together with training, education has a major part to play in producing the specialists with skills and qualifications to enable the new technology to be exploited to best advantage. Education also has a major role in preparing society for its full consequences. In work, and in adult life generally, versatility and adaptability will be even more at a premium. Young people will need to be better grounded in basic knowledge and intellectual skills, and the education system must offer them the continuing opportunity to broaden and extend their knowledge and skills throughout adult life. The development of educational technology will open up new opportunities in the education process itself.

In the schools, the new technology calls for a faster pace, rather than a change of direction, in promoting measures to raise standards and relate what is done more closely to the world of work. Action is being taken to increase the supply of teachers in the necessary basic subjects and to improve their professional equipment. Steps have already been taken to improve the supply of teachers of mathematics, the physical sciences, and craft, design and technology. A programme on in-service training for teachers, to improve their competence in relevant subjects and to familiarise them with developments in microelectronics, is being formulated and costed. A national programme is being developed to help schools and colleges become more fully aware of microelectronics and to make the best use of the opportunities it offers.

The further and higher education sector has a very substantial contribution to make to the development of engineers, designers, and technicians of all kinds – not only in electronics – versed in the applications of the new technology. Many universities and colleges are already heavily involved in teaching and research in this area, and expertise is available to be built on and extended. Consideration is being given to strengthening the microelectronics capability of certain polytechnics and universities to enable them to develop further as centres for teaching, consultancy, training and research at an advanced level. The Science Research Council is increasing its support for research and post-graduate study in microelectronics.

Direct support

The Department of Industry's software products scheme provides direct support to the computing services industry for the development of new software packages and for their initial marketing. The government believes that the scheme should be extended to give a new emphasis on microelectronics applications. New provisions under the scheme will include extension of support for marketing costs of software products from one year to two, and will offer 25 per cent grants as an alternative to 50 per cent recoverable support.

Purchasing

The public sector is a major market for many goods and in the future will include goods incorporating microelectronics. The government is anxious that in the exercise of that purchasing power we should encourage British industry in its application of the technology. It will be looking to the public sector to be in the lead in applying microelectronics, wherever this is possible and economically desirable, and to encourage firms in manufacturing industry and the service sector in the production of products and systems incorporating microelectronics. Firms supplying the public sector will also be eligible for assistance under MAP with product and process innovations incorporating microelectronics.

Taking the magic out of microprocessors

Industrial management's increasing awareness of the all-pervasive and still advancing microelectronics technology was evident in the great interest shown in the session and seminars of the design engineering conference devoted to microprocessors. Throughout the emphasis was placed firmly on what microprocessors could do and how to apply them. A concerted effort was made to remove the magic from microprocessors.

Denis Dalton, director of group technical services at the Plessey Co Ltd, clarified the designer's objective in the first paper of Tuesday's session on microprocessors. The task, in his view, was to decide what effect microprocessors could have on the product, the market and the methods of manufacture to which everyone was accustomed. It was a matter, essentially, of deciding how the right new product could be marketed at the right time and price.

The universality of this definition of the task faced by managers and engineering designers in industry put the microprocessor in persepective. It was simply a further factor to be considered in the design process. Its successful assimilation into product design was demonstrated at the Design Engineering Show by the range of products exhibited on the Department of Industry's stand.

Applications

Microprocessor applications fall into two categories. They are used to enhance the performance of established product lines in which they replace mechanical, electro-mechanical or conventional electronic components, and they are used in entirely novel products which exploit the microprocessor's special characteristics. The government's Advisory Council for Applied Research and Development (Acard) suggested 12 broad areas of products and services which offered the UK the greatest potential for national and commercial benefits from the application of microprocessors. Acard's paper on 'The applications of semiconductor technology' listed domestic appliances, education aids, information and data services, motor vehicles, energy conservation, food production and processing, home entertainment, medical systems, retailing and distribution, security systems, telecommunications and traffic control.

Plant and machinery control is an area where the microprocessor is already having a significant impact. In industrial instrumentation the microprocessor is shortening the time between measurement and analysis from hours to minutes and even seconds. Controllers of numerically controlled machine tools which employ microprocessors can now do the job of earlier types of control computer at a fraction of the cost. With the advent of the microprocessor easily applied and effective distributed plant control, possibly governed overall by a central unit, has become an economic proposition.

The effect of the microprocessor, in these many applications, was to reduce waste, frustration, muddle and hazard said Dr Duncan Davies, chief scientist and engineer at the Department of Industry, who chaired the microprocessor session at the conference. The use of microprocessors in the control of car engines was simply about stopping the waste of petrol. Stock control and inventory management applications of microprocessors was a means of avoiding the waste of cash in the form of unnecessary borrowing on which unnecessary interest was being paid. Hazardous jobs could be eliminated by the employment of microprocessors to provide remote control of noisy, hot or hostile processes.

Repetition

What the microprocessor does in essence is to accept data in the form of electrical signals, perform simple arithmetic calculations on the data and give a chosen output. It will carry out the same action, everytime it is required and at high speed. If the input data is changing at high speed the output will change at the same speed for most practical purposes. Due to the

Microprocessor checklist

There could be a job for a microprocessor if a company's product or process includes one or more of the following:

- ☐ mechanical or electro-mechanical control
- ☐ a need for accurate control of acceleration, speed or displacement of moving parts
- ☐ a requirement for exact control of temperature, flow or pressure
- ☐ more than a few operator controls
- ☐ a requirement for frequent calibration
- ☐ a need for the user to read dials or meters
- ☐ a need for the user to make calculations or look up tables
- ☐ a requirement for a fast response from the operator
- ☐ direct dependence on events happening elsewhere
- ☐ measurement and control of large amounts of energy.

By replacing approximately 30 integrated circuits with a single pre-programmed microprocessor in this 3107 copier, Rank Xerox has achieved a 22 per cent reduction in cost and a 32 per cent improvement in reliability of the main printed circuit board.

high speed at which it operates, the microprocessor will often have spare capacity which, in effect, can be used to make it do several things at once.

To do these things in all practical applications the microprocessor will need to be accompanied by a memory for storage of the instructional programme and data, and input and output devices to enable it to communicate with the outside world. In this configuration it becomes a micro-computer.

In his paper, Denis Dalton suggested that there was nothing new in what microprocessors could do. Electronics before the microprocessor could do all that can be done now – but at great cost, in considerable bulk and with the expenditure of large amounts of power.

The significance and the promise of present developments lies in what the microprocessor is. As defined in Mr Dalton's paper, the microprocessor is a tiny, electronic, digital, programmable processor fabricated on a 'chip' of semiconductor. As such it is light and robust, will operate over a wide temperature range, consumes very little power and is very reliable. And, because it can be easily mass produced, it is very cheap and getting cheaper. In 1960 the price of the basic building block of the electronic digital circuit, the 'logic gate', was between £10 and £100. Today, with the thousands of them on a single 'chip', the price per building block is between one-tenth and one-hundreth of a penny.

Time, day, tariff structure, VAT rate, distance bands and call duration are combined in this telephone charge clock, made by Monitel Ltd of Colchester, to compute the cost of a telephone call instantaneously. This level of computer power is provided at low cost with the use of a microprocessor. The equipment is not connected to the telephone system.

Precision

One thing that the microprocessor would not do, Denis Dalton stressed, was that it would not 'think'. The thinking had to be done by the programme designer. He could then rely on the microprocessor to carry out his instructions exactly. This required an equivalent degree of precision on the part of the designer in preparing the programme of instructions. A faulty instruction would naturally result in totally incorrect operation.

The use of a microprocessor, he pointed out, would not reduce the difficulty or cost of the design task. Initially at least, it might increase them. It might reduce product cost and increase flexibility of use. It might offer extra capability but it could not replace the need for abstract thought and logic which was the ultimate demand placed upon the engineer designing a system. A decision to embody a microprocessor into hardware design could not be taken lightly. Trade offs between design and manufacturing costs on one hand and sales features and appeal on the other had to be carefully considered.

Training

New skills may need to be acquired by the design engineer. Training for all levels of interest from senior management to the technician are available. They vary from one-day seminars, one or two-week courses to full-time study mounted by polytechnics, universities, colleges of higher education, commercial training establishments, industry research associations, professional institutions and industry training boards. The National Computing Centre Ltd in Manchester is co-ordinating the Department of Industry's three-year national programme of support for appropriate training courses.

Advice and consultancy services on the application of microprocessors are becoming widely available. Names of approved consultants and grants of up to £2,000 to defray the cost of feasibility studies and initial consultancy work are available through the microprocessor applications project (MAP) of the Department of Industry.

The department's industrial research establishments – Warren Spring Laboratory, National Physical Laboratory, National Maritime Institute, National Engineering Laboratory and the Laboratory of the Government Chemist – are centres of expertise in the use of microprocessors. The Computer Aided Design Centre of the department specialises in using microprocessors in computer aided design tools that can, in turn, help the design engineer apply microprocessors to his particular product or process.

Once a decision has been made to introduce microprocessors into a company's product or production processes, further government assistance is available through MAP. Support is available for industrial projects which involve the application of microprocessors, irrespective of whether the projects have been preceded by specific consultancy assistance.

Fundamental changes sweeping through product design

Almost every car component would require redesign in the next seven years forecast former Leyland chief Derek Whittaker, now GKN product development manager, in the opening paper on 4 December at the Design Engineering Show and Conference in Birmingham. His view reflects the fundamental nature of the changes now about to sweep through the entire field of product design.

An enthusiastic response to the conference indicates that his views are shared by many others. Over 1800 attended the conference sessions during the week and over 600 took part in the seminars. The sessions and seminars on microprocessors are sold out.

The conference was organised in association with the Institution of Mechanical Engineers. It contained 16 main themes, each a separate discreet session in its own right timed to last half a day. In all, some 50 papers were presented. The conference programme was planned by a team led by Sir H. Monty Finniston.

Special interest was aroused by the inclusion of practical 'hands-on' seminars about microprocessors, at which delegates programmed their own small scale controllers. There were in addition more conference sessions on microprocessors, computers and other electronic technology for mechanical engineering designers, and a considerable presence on the exhibition stands from most of the pacemakers among suppliers of the new

The Department of Industry participated in the exhibition and conference to draw attention to the new aid programmes to assist in training industry's product designers to make full use of microelectronics technology.

Microelectronics and microprocessors, however, were only part of a big, broad-based event, designed to explore all aspects of modern product design and show the pace of several fast-moving technologies.

Award focuses attention on women technicians

Girl technician award winner, Erzsebet Kibble, checking international telephone charging equipment.

Erzsebet Kibble, who is responsible for testing Thorn-Ericsson telephone equipment, was named 1978 girl technician of the year by Shirley Williams, Secretary of State for Education and Science, in London on 4 December. This award, sponsored by the Caroline Haslett Memorial Trust and the Institution of Electrical and Electronics Technician Engineers, was made to focus attention upon electrical and electronic engineering as a professional worthwhile career for women.

Mrs Kibble, aged 26, is an assistant test manager on computer-controlled telephone exchange equipment at Thorn-Ericsson Telecommunications (Sales) Ltd at Mondial House, London. Born in Hungary and trained as a telecommunications engineer, she came to England and found she had to start again to obtain acceptable qualifications. Over a period of six years she has managed to cope with a new language and completely different environment while achieving higher national certificate qualifications and moving rapidly to a position of importance in her career.

All the entrants for the award were of an extremely high standard says IEETE, the organisers. The finalists, five of whom with Mrs Kibble are pictured here, were chosen for having successfully undertaken the necessary technical education and training, and holding responsible jobs in the electrical and electronic engineering profession.

Finalist Geraldine O'Farrell is responsible for the management of 13 electrical sub-stations in Iraq and the general supervision of all the services to a set of offices currently under construction in the UK. While working for her present employers, electrical contractors Higgins and Cattle Ltd, 24-year old Geraldine obtained an HNC in electrical engineering.

As a marine electronics technician, 24-year old finalist Jocelyn Parker visits ships of all nations to test and repair marine radar, radio and other equipment. Jocelyn is a qualified merchant navy radio and electronics officer with Marconi International Marine Co Ltd of East Ham, London.

Finalist, Zandra Bradley working on the electrical installations on a nuclear submarine at HM Dockyard, Chatham. At 24, Zandra is an assistant electrical test officer with an HNC in electrical and electronic engineering including three supplementary certificates.

Finalist Anna Ford, age 26, examining microwave circuits deposited on ceramic substrates. With an HNC in electrical and electronic engineering, Mrs Ford is a research engineer involved in microelectronics material systems at EMI Electronics Ltd at Wells, Somerset.

Carrying out logic checks on a digital electronic system, finalist Rita Tingle at the age of 24 is a research engineer with Standard Telecommunications Laboratories Ltd at Harlow. Mrs Tingle has an honours degree in electronics and started work as a graduate engineer at STL.

New products

Freepost reader service

For further information on items in this section, circle the corresponding number on the reader services page near the end of the magazine.

Large fluid-bed technology proven

With experience and data readily available from the design, installation and operation of a 30 MW coal-fired fluid-bed demonstration boiler at Rivesville in the United States, Foster Wheeler Power Products Ltd says it can now offer designs to industry for large fluid-bed units.

Fluid-beds can use low grade fuels, such as high ash or high sulphur coal, manufacturing by-products or even processed municipal waste. The company believes that the immediate emphasis should be either to replace out-dated, or to add new, solid-fuel boiler plant for various process steam requirements. It also claims that the trend to conserve gas and oil fuel will open up the demand for fluid-bed boiler plant by electricity authorities and a number of industries, including even refineries.

The UK company benefits from its association with the international Foster Wheeler organisation which is developing fluid-bed technology on a corporate basis and in various countries of the world. Much of the large scale fluid-bed technology has been performed in the United States, but Foster Wheeler Power Products in the UK has also been deeply involved in developing designs over the last 10 years and has its own facilities, from which a technology base has been developed. It has run its own fluid-bed pilot unit for the last two years and has investigated schemes for boiler sizes from 20 000 lb/hr to systems capable of supplying power to generate 600 MW.

Longer-term options

Foster Wheeler interests also embrace the longer-term options of a pressurised fluid bed plant in a combined cycle mode and the various coal gasification concepts which are being developed, some at demonstration plant stage. These systems can eventually offer better operating efficiencies and lower initial costs.

Further information: circle 243

All modes of pipe and cable tracing performed

Sharetree Ltd of Stroud, Gloucestershire, has introduced the model J 1078 pipe and cable locator under the name Parametron. Developed by Sharetree's Parametron division for the Post Office, under whose license it is now manufactured, the instrument is claimed to perform all modes of metallic pipe and live cable tracing required by the construction industries and public services.

The J 1078 includes four distinct components: transmitter, receiver, wand and carrying handle. For live-cable detection, the transmitter is not used, and may be dismounted from the carrying handle. The wand, which includes two independent search coils, is plugged into the receiver and the presence of a live cable will cause a change in the signal heard through the operator's earpiece. Subsequent use of alternative positions for the search head allows cable depth to be gauged.

Detection of buried metal objects with the transmitter mounted on the handle of the pipe and cable tracer.

The detection of buried metal objects, such as pipes, cables and valve covers, requires the transmitter to be mounted on the handle. In this mode the transmitter's 91 kHz amplitude modulated signal will induce a detectable signal in the buried object, indicated by a meter on the transmitter. If a compact object is located, this reading will be at its maximum immediately above its buried position: if it is a pipe or cable, a search procedure with a second operator using the dismounted transmitter will locate its exact position.

Buried markers, now widely used by the Post Office and other organisations to assist in the location of buried services, are located with the transmitter on the handle and the relevant controls set to 'marker'. This mode allows a general search to be made in a required area without signals from other buried objects being registered by the receiver.

Further information: circle 244

Plastics material challenges light alloys

An advanced rigid engineering plastics material, Polypenco's 'Novatron', has properties which make it a rival to light alloys for many applications. The new material, which possesses isotropic properties with excellent dimensional stability, is now available after a considerable development programme by Polypenco Ltd and its parent company in the United States, the Polymer Corporation.

Using a value-engineered moulding technique perfected through existing casting know-how, Polypenco is now able to offer mouldings in Novatron which previously have been limited to production in light metals or alloys.

Novatron is easily machined using normal workshop practice, has no plastic memory, and being stress free is dimensionally stable. For the first time in plastic moulding, components can be produced with thin or thick sections, or both, with equal facility and of a size and weight associated with the metals industry. The material will accept a range of surface finishes including polishing, painting and plating.

The large production batches required to justify complex injection moulding tooling are unnecessary with Novatron. Being essentially a process carried out at lower pressures and temperatures, relatively simple tooling can be used resulting in considerable savings in initial tooling costs. A variety of mould materials may be utilised and Polypenco can advise on the most economical tooling for particular applications, especially prototype and development batch sizes.

Considerable weight savings in replacement structures are possible since the new material is approximately half the weight per unit volume of aluminium alloys, one-sixth the weight of steel and one-seventh the weight of bronze. Good electrical properties, high corrosion resistance and the ability to cast thick sections make Novatron an excellent material for use in electrical equipment and insulators.

Components such as bushes, steel inserts and other engineering plastics can be incorporated in mouldings of the material. Composite structures of Novatron incorporating customers' components can be supplied in endless combinations.

At normal ambient temperatures, Novatron, has comparable strength properties to other engineering plastics. An unusual aspect is increased tensile strength with maintained resilience at low temperatures making the material ideal for low temperature applications, within an operational range of −100°C to +65°C.

Further information: circle 245

Finance for technology

The National Research Development Corporation provides financial and other support for technological developments of potential commercial importance. NRDC promotes the adoption by industry of new products and processes invented in government laboratories, universities and elsewhere. Further details are available from the National Research Development Corporation, Kingsgate House, 66-74 Victoria Street, London SW1.

Parliament

Monday, 27 November

Gatt negotiations

Tim Renton (Mid-Sussex) asked the Secretary of State for trade what resolution he expected to the general agreement on tariffs and trade multilateral negotiations by mid-December; and what part he was playing in those negotiations.

Mr Smith said that he hoped that the negotiators would be able substantially to complete their work in December, although ratification of the results by the EEC council must wait on a satisfactory resolution of the United States' countervailing duty waiver problem. He had represented the United Kingdom at the council discussion on 21 November of the EEC approach to the final stages of the negotiations and expected to play a full part in any further such discussion or other important but less formal discussions.

British film industry

Tony Durant (Reading North) asked the Secretary of State for Trade whether he had any immediate plans to meet representatives of the film industry and Hugh Jenkins (Wandsworth, Putney) asked the Secretary of State for Trade whether he would be providing preliminary information prior to the drafting of legislation to establish a British film authority; and, if so, in what form this would be provided and when.

Mr Meacher said that the secretary of state and he were always ready to meet representatives of the film industry, He had had discussions with the representatives of the British Film Producers' Association, the Association of Independent Producers, the Cinematograph Exhibitors Association and the Association of Independent Cinemas. Mr Dell had also met the chairman of the interim action committee and some of his colleagues. Mr Meacher added that he hoped to make a statement about the turn of the year regarding future legislation.

Operation of MFA

Max Madden (Sowerby) asked the Secretary of State for Trade if he was satisfied with the operation of the multifibre arrangement and James Lamond (Oldham East) asked the Secretary of State for Trade if he was satisfied that all the countries involved were observing the multifibre arrangement.

Mr Smith pointed out that there were bound to be some problems in the first year of operation of new and complicated arrangements but he was satisfied that they were broadly now operating as was intended.

Nicholas Winterton (Macclesfield) asked the Secretary of State for Trade how many breaches of the multifibre arrangement by the Mediterranean associates had occurred in the period since the current multifibre arrangement had become effective.

Mr Meacher said that except in the case of Egypt there were no agreements under the multifibre arrangement as such with the Mediterranean suppliers. In December 1977 the EEC council of ministers had agreed on the amount of imports that would be allocated for these suppliers. With most of the countries concerned these amounts, in a few cases at modified levels, had been embodied in voluntary restraint arrangements. In the case of the UK, 55 restraint levels were involved. Imports in the first nine months of 1978 had exceeded the relevant amounts in nine cases. In eight cases action had been taken to stop further imports this year. Further imports in the ninth case had been small.

EEC companies in South Africa

Ray Whitney (Wycombe) asked the Secretary of State for Trade whether other EEC governments had yet fulfilled the expectation he declared on 25 May 1978 that they would follow a reporting format for their national companies operating in South Africa similar to annex 3 of command paper 7233.

Mr Smith replied that the West German and Belgian governments had sent the UK reporting format to their employers' organisations and the Danish government had sent out a reporting instruction based upon the United Kingdom white paper, which was at the same time enclosed for information. Britain would continue to impress upon her partners in the nine strong views in favour of a common reporting format.

Development of tourism

Stephen Ross (Isle of Wight) asked the Secretary of State for Trade whether he would now take steps to amend the guidelines applicable to section 4 of the Development of Tourism Act 1969 so that aid could be made available nationally to suitable projects, rather than remain restricted to development areas only, and Robert Hicks (Bodmin) asked the Secretary of State for Trade what plans he had to extend the areas of the United Kingdom eligible for financial assistance under section 4 of the Development of Tourism Act.

Mr Meacher said that as the secretary of state had announced in a written reply on 22 November, the government had decided to make this assistance available in future in intermediate areas as well as development and special development areas to which it had previously been confined. The eligible areas would be reviewed in two or three years time.

Imports of Japanese vehicles

Ronald Atkins (Preston North) asked what were the latest figures of imports in 1978, of private cars and commercial vehicles, respectively, manufactured in Japan.

Mr Meacher said that according to the Overseas Trade Statistics in the first nine months of 1978, Britain imported from Japan 143 000 passenger motor cars, including some light commercial vehicles, to the value of £253 million; and 7750 motor vehicles for the transport of goods or materials, to the value of £14 million.

Hal Miller (Bromsgrove and Redditch) asked the Secretary of State for Trade what discussions had been held in the last six months with the Japanese government concerning the export of Japanese cars and commercial vehicles to the United Kingdom.

Mr Meacher replied that the Japanese government's attention had recently been drawn to the growing share of the British market taken by Japanese cars, and they had explained that they would strengthen their administrative guidance with the intention of ensuring that their March statement would be fulfilled.

Imports of manufactured goods

Tom Litterick (Birmingham, Selly Oak) asked the Secretary of State for Trade what proportion of United Kingdom imports consisted of manufactured goods during the latest 12 month period for which figures were available; and what was the corresponding proportion five years ago.

Mr Meacher said that in the 12 months ended October 1978, imports of manufactured goods had accounted for 63 per cent by value of total imports, compared with a figure of 56 per cent for the year 1973.

Imports of cobalt

Frank Hooley (Sheffield, Heeley) asked the Secretary of State for Trade if he would list the quantities of cobalt imported into the United Kingdom in 1976 and 1977, indicating the main supplier countries and the percentage of imports from each source.

Mr Meacher gave the following information:

	1976		1977	
	Metal, unwrought or wrought (and articles thereof) [1]	Oxides and hydroxides [2]	Metal, unwrought or wrought (and articles thereof) [1]	Oxides and hydroxides [2]
Total imports (tonnes)	2 262	808	2 124	1 096
Principal countries of consignment, with percentages of total imports:				
Belgium and Luxembourg	44.5	0.6	42.0	1.0
Zambia	24.4	—	23.9	—
Canada	0.0	96.8	0.1	95.5
Finland	8.7	—	10.0	—
Tanzania	0.9	—	4.4	—
Federal Republic of Germany	1.4	—	3.9	—
Norway	3.9	—	3.5	—
United States of America	10.0	—	3.3	2.3
South Africa	—	—	2.7	—
France	4.1	2.5	2.6	1.0

Source: UK Overseas Trade Statistics, [1] SITC(R) 689.5 (part) and [2] SITC(R) 513.54.

Export price of manufactures

Bryan Gould (Southampton, Test) asked the Secretary of State for Trade if he would circulate a table, showing the percentage increase in the United Kingdom export price of manufactures in each statistical base-weighted period since 1949 for periods in which any two series overlapped and an explanation for the differences, if any, in the results.

Mr Meacher gave the following information:

PERCENTAGE CHANGES IN THE UK EXPORT UNIT VALUE INDEX OF MANUFACTURE

	Original series		Subsequent series	
Period of comparison	Base year	Per cent change	Base year	Per cent change
1949 Q1 to 1950 Q4	1949	+9	1950	+9
1950 Q1 to 1951 Q4	1950	+31	1951	+29
1951 Q1 to 1952 Q4	1951	+13	1952	+14
1952 Q1 to 1953 Q4	1952	−5	1953	−5½
1953 Q1 to 1954 Q4	1953	−2	1954	−2
1961 Q1 to 1962 Q4	1954	+2½	1961	+2½
1970 Q1 to 1972 Q4	1961	+24	1970	+16
1975 Q1 to 1977 Q4	1970	+61	1975	+56

Note: The figures in the table compare, for appropriate 'overlap' periods, the percentage change in the unit value index series compiled according to the pattern of trade in successive base years. The 'overlap' period has been defined as spanning the first and last quarters for which both series were compiled on a strictly comparable basis. Thus, for example, for the 1970-based series and the existing 1975-based series, which was introduced in January 1978, the overlap period runs from Q1 1975 to Q4 1977.

In each of the above comparisons, the difference in the growth rates for the two series will reflect a number of factors, which may work in different directions. In particular, the series will have been derived from different weighting patterns reflecting the composition of exports of manufactures in the two base years. Further, improvements in methodology and in the quality of the sample will have been made at successive rebasings. In the years up to 1954, rebasing was undertaken annually and was carried back for the previous year. Differences in this period are generally small. In addition to the factors given above, for the 1961-based and 1975-based series, differences may have resulted from the introduction with these series of new trade classifications, while towards the end of the life of the 1961-based and 1970-based series changes in the tariff headings may have been a contributory factor. It is not readily possible to quantify the effect of each of these changes separately.

Ministers

Department of Industry

Secretary of State: Eric Varley
Ministers of State: Alan Williams
Gerald Kaufman
Parliamentary Under-Secretary of State: Leslie Huckfield

Department of Trade

Secretary of State: John Smith
Parliamentary Under-Secretaries of State: Michael Meacher
Stanley Clinton Davis

Department of Prices and Consumer Protection

Secretary of State: Roy Hattersley
Minister of State: John Fraser
Parliamentary Under-Secretary of State: Robert Maclennan

Imports of finished leather

Kevin McNamara (Kingston upon Hull Central) asked the Secretary of State for Trade if he would make a statement on the import of cheap finished leather into the United Kingdom and its effects on British tanners.

Mr Meacher replied that his department had assisted the British Leather Federation in presenting a case for countervailing action to the EEC commission, and the European trade association (Cotance) submitted an application to the commission on 20 November. The commission had been asked to include this subject on the agenda of the next meeting of the EEC anti-dumping committee on 4 December, where the department would of course give it full support. The Brazilian case was particularly urgent for the UK, but in addition the European tanners were concerned about leather imports from Argentina. The commission was discussing the situation with Cotance and was considering what action could be taken.

Imports of vehicles

Peter Hardy (Rother Valley) asked the Secretary of State for Trade what proportion of the British car market had been met by imported vehicles during the last month for which figures were available.

Mr Meacher replied that imported vehicles had accounted for 57.7 per cent of the British car market in October 1978, according to figures published by the Society of Motor Manufacturers and Traders.

Imports of horticultural glass

Leslie Spriggs (St Helens) asked the Secretary of State for Trade if he would publish the names and countries of origin of firms who were exporting horticultural glass to the United Kingdom, and the difference in the level of selling prices in the country of origin and the prices, per square metre, when sold to their customers in the United Kingdom during the last 12 months for which the above information was available.

Mr Meacher pointed out that details of identifiable imports of horticultural sheet glass by country of origin could be provided, but not the names of the exporting firms or wholesale or retail prices in their domestic or the UK market.

IDENTIFIABLE IMPORTS OF HORTICULTURAL SHEET GLASS, OCTOBER 1977-SEPTEMBER 1978 INCLUSIVE

Country of origin	Square metres	Value (£'000 cif)	Average value per square metre (pence)
USSR	1 154 786	704	61.0
Romania	645 221	452	70.1
Poland	521 233	412	79.0
Czechoslovakia	295 635	224	75.8
Hungary	178 114	174	97.7
Netherlands	110 424	119	107.8
German Democratic Republic	22 313	31	138.9
Spain	20 937	13	62.1
Irish Republic	878	2	—
Federal Republic of Germany	630	1	—
Total	2 950 171	2 131	72.2

Note: Average values derived from the Overseas Trade Statistics are not true prices. They may be affected by variations in the quality and thickness of the glass imported and in transport costs and other factors.
Source: UK Overseas Trade Statistics ex SITC 664.3 (1977 – 7005-1026; and 1978 – 7005-1000).

Maltese textile imports

Joan Lestor (Eton and Slough) asked the Secretary of State for Trade what discussions he had had with Malta regarding textile imports.

Mr Meacher replied that following the breakdown of negotiations between the EEC commission and the Maltese government a delegation led by Dr Holland, Maltese Minister for Trade, had visited the UK on 8 November. They had had discussions with the then Secretary of State for Trade; the Minister of State, Department of Industry, and himself, and later saw the Minister of State at the Foreign and Commonwealth Office. He regretted that these discussions had broken up without agreement. On 9 November the commission had introduced restrictions on Maltese exports to the UK of six categories of textile products.

IMIF scrap and build scheme

Donald Dewar (Glasgow, Garscadden) asked the Secretary of State for Trade what steps he was taking to encourage British shipowners to order replacement tonnage with British shipyards on a scrap and build basis.

Mr Clinton Davis said that the International Maritime Industries Forum (IMIF) was expected shortly to submit proposals for an international scrap and build scheme, which would be carefully considered by the Secretary of State for Industry and himself.

Imports of coal

Edwin Wainwright (Dearne Valley) asked the Secretary of State for Trade if he would give the number of tons of coal imported in each of the past four years and the countries from which the imports had come.

Mr Meacher gave the following information:

Thousand tons

	1974	1975	1976	1977	Jan-Sep 1978
Total	3 485	4 990	2 791	2 400	1 821
of which consigned from:					
Australia	980	2 583	1 443	838	845
United States of America	1 652	1 766	738	435	263
Netherlands	23	35	128	333	13
Federal Republic of Germany	69	40	166	200	168
Belgium/ Luxembourg	2	8	81	183	13
Poland	681	93	126	174	360
Soviet Union	—	1	28	146	81
Irish Republic	10	45	14	41	38
France	2	—	8	24	1
Morocco	6	—	15	16	18
South Africa	9	26	13	5	19
Canada	46	359	0	0	—
Other countries	6	33	30	4	2

Notes: Because of rounding, there may be slight discrepancies between the totals shown and the sums of the constituent items. — Nil trade. 0 trade less than 500 tons.
Source: UK Overseas Trade Statistics, SITC (Rev 1) sub-group 321.4 and SITC (Rev 2) sub-groups 322.1 and 322.2.

Imports of vehicle bulbs

Laurie Pavitt (Brent South) asked the Secretary of State for Trade if he would publish a table showing the percentage of the market now held by foreign imports of vehicle bulbs together with the number of vehicle bulbs imported from Hong Kong, Taiwan and South Korea.

Mr Meacher gave the following information:

PERCENTAGE OF THE UNITED KINGDOM MARKET HELD BY IMPORTS OF VEHICLE BULBS

	1975	1976	1977	1978 (first half)
In terms of value	37.8	47.1	57.2	55.2
In terms of numbers	28.3	34.2	39.5	43.2

NUMBER OF VEHICLE BULBS IMPORTED FROM THE FOLLOWING FAR EASTERN SOURCES — Thousands

	1975	1976	1977	1978 (first half)
Hong Kong	7 399	6 867	10 124	6 772
Taiwan	446	4 916	7 434	3 478
South Korea	1 680	964	3 282	4 747

Note: Vehicle bulbs are defined as 'Electric light bulbs, filament type, complete, not exceeding 28 V, motor vehicle type'.
Source: Overseas Trade Statistics and Business Monitor PQ 369.4.

EEC trade

David Knox (Leek) asked the Secretary of State for Trade what had been the balance of trade between the United Kingdom and the EEC for the most recent 12 month period; and how this compared with the figures for 1975 and 1976.

Mr Meacher replied that the latest figures available on a balance of payments basis were for the second quarter of 1978. However, Britain's crude deficit with the EEC in the 12 months ended October 1978 had been £2,388 million. The corresponding figures for 1975 and 1976 were £2,386 million and £2,261 million, respectively.

Non-proliferation of nuclear weapons

Frank Allaun (Salford East) asked the Secretary of State for Trade if he would make a statement on the supply to Pakistan of equipment which could be used to make nuclear weapons, by certain British firms; and if he would take action to prevent this supply in accordance with British obligations under the nuclear non-proliferation treaty.

Mr Meacher replied that the government accorded the highest priority to measures to prevent the proliferation of nuclear weapons. A wide range of goods, some of which could contribute to nuclear proliferation, was subject to control under the Export of Goods (Control) Order 1978. This control was extended by amending the order with effect from 9 November 1978 to prohibit the export to any destination of certain frequency changers except under the authority of a licence.

Coastguard services

Evelyn King (South Dorset) asked the Secretary of State for Trade what plans he had to run down the coastguard services at Swanage and St Aldhelm's Head; and for what reasons.

Mr Clinton Davis replied that he had no plans to run down these services but, consistent with the general policy of increasing vhf coverage in preference to the much less effective visual watch, he proposed to make greater use of auxiliary coastguard at these two stations.

Bermuda agreement

Norman Tebbit (Waltham Forest, Chingford) asked the Secretary of State for Trade if he had received any requests from the United States government for any amendments to the Bermuda agreement on air services.

Mr Clinton Davis said that the United States had not made any specific requests for amendments to the Bermuda 2 air services agreement. However during air service talks in Washington earlier this month it had been agreed, in accordance with annex 4 of the Bermuda 2, to continue negotiations with a view to concluding a more liberal agreement for cargo services. Further talks on this subject had been arranged for mid-December in London.

Trade in manufactured goods

Bryan Gould (Southampton, Test) asked the Secretary of State for Trade what were the figures for the import and export of manufactured goods, less precious stones, in the United Kingdom's trade with the EEC six: a for the first nine months of the current year and b expressed at an annual rate.

Mr Meacher gave the following information:

MANUFACTURED GOODS LESS NON-METALLIC MINERAL MANUFACTURES (SITC DIVISION 66) — £million

	Imports (cif)	Exports (fob)
Jan-Sep 1978	7 649	5 588

Note: A continuation of trade at the rates applying in the period January-September would produce figures of £10,198 million cif for imports and £7,451 million fob for exports for the year as a whole.
Source: UK Overseas Trade Statistics, SITC sections – inclusive.

BTA funds

Robert Adley (Christchurch and Lymington) asked the Secretary of State for Trade what had been the movement, in real terms, in funds available to the British Tourist Authority for overseas promotion, for each year since 1970; and if he would express this annually, in real terms, as a percentage increase or decrease on the 1970 figure.

Mr Meacher gave the following information:

	Grant in aid (£'000)	Revalued at 1970 prices (£'000)	Index of change in real terms
1970-71	3 250	3 250	100
1971-72	3 550	3 479	107
1972-73	4 500	4 019	124
1973-74	5 600	4 648	143
1974-75	5 446	4 221	130
1975-76	7 058	4 567	141
1976-77	8 085	4 164	128
1977-78	9 634	4 393	135
1978-79	11 087 (cash limit)	4 468	137

Trade in steel

John Ellis (Brigg and Scunthorpe) asked the Secretary of State for Trade what were the imports and exports of steel for the latest convenient period for which he had figures.

Mr Meacher said that in the 12 months ended October 1978 3.85 million tonnes of ingots, semi-finished and finished steel had been imported and 4.16 million tonnes had been exported.

Joan Maynard (Sheffield, Brightside) asked the Secretary of State for Trade in view of the serious situation in the special steels industry, what action he proposed to take.

Mr Meacher replied that the industry's current difficulties related primarily to low-cost competition from within the EEC. The Secretary of State for Industry had put specific proposals to the commission for dealing with the problem and Viscount Davignon's reply was now being studied. On the issue of imports from outside the community he was pressing for improved coverage of special steels in the EEC agreements with the principal exporting countries in 1979.

Roy Hughes (Newport) asked the Secretary of State for Trade what was the level of steel imports into the United Kingdom at the latest available date; what was their country of origin; and what was the respective tonnage from each individual country.

Mr Meacher gave the following information:

NINE MONTHS ENDED SEPTEMBER 1978 IMPORTS OF INGOTS, SEMI-FINISHED AND FINISHED STEEL

	Thousand tonnes
Total	2 920
of which consigned from:	
Federal Republic of Germany	529
Netherlands	433
Belgium and Luxembourg	316
France	249
Sweden	245
Italy	204
Japan	130
Spain	102
Austria	87
Norway	86
Finland	82
Denmark	67
Poland	57
South Africa	50
Irish Republic	45
Other countries	238

Note: Information in comparable detail by country of origin could be provided only at disproportionate cost.
Source: UK Overseas Trade Statistics, SITC (Rev 2) Division 67 (mainly 672-75 and 678.2-4).

Farm machinery prices

Allen McKay (Penistone) asked the Secretary of State for Prices and Consumer Protection if he would ask the Price Commission to investigate farm machine prices in view of the increase in the price of combined harvesters from £6,000 in 1974 to £22,000 in 1978.

Mr Maclennan pointed out that the decision whether to investigate the price increases of a particular firm was a matter for the Price Commission itself. The secretary of state was able to direct the commission to examine general matters relating to prices and charges within a particular sector. He had no present plans to direct the commission to make an examination of farm machinery, but would bear the suggestion in mind.

Tyre pressure gauge testing

Andrew Faulds (Warley East) asked the Secretary of State for Prices and Consumer Protection when he expected to introduce a national tyre pressure gauge testing scheme, following the establishment in May 1977 of the departmental working party.

Mr Fraser said that a management committee set up to administer the scheme had informed him that it should be possible to introduce the scheme, which would be voluntary, in the spring of 1979.

Consumer credit regulations

J. Enoch Powell (South Down) asked the Secretary of State for Prices and Consumer Protection, in view of representations made to him upon the Consumer Credit (Total Charges for Interest) Regulations 1977, what proposals he had for making new regulations or, if necessary, amending the enabling act.

Mr Fraser said that he had in mind to amend the Consumer Credit (Total Charge for Credit) Regulations 1977 to exclude endowment insurance premiums from the total charge for credit. To achieve truth in lending appropriate disclosures would be required in the proposed advertisements and quotations regulations. He was also considering certain other less significant changes in the regulations.

Examination of weighing or measuring machines

William Whitlock (Nottingham North) asked the Secretary of State for Prices and Consumer Protection what was the period of delay in the examination of new machines by the Legal Metrology Department; and what steps he was taking to end it.

Mr Fraser replied that the average delay before examination started of new patterns of weighing or measuring equipment was currently 15 months, but it could be from nine to 21 months because the range and complexity of submissions varied and could not easily be forecast. An unforseeable surge of new submissions over the past year had contributed to the delay. Extra staff were being recruited and in the meantime all existing technical effort was being concentrated on examination work.

Industrial development advisory board

Frank R. White (Bury and Radcliffe) asked the Secretary of State for Industry if he would publish the names and the remuneration of the members of the industrial development advisory board.

Mr Huckfield gave the following information:

Chairman

Sir Robert Clark	Chairman and chief executive, Hill Samuel Group

Members

Sir William Barlow	Chairman, the Post Office
Rt Hon Lord Brown, PC	Former chairman, Glacier Metals
D. H. Chilvers	Senior investigation partner, Coopers and Lybrand
Sir Campbell Fraser	Chairman and managing director, Dunlop Holdings Ltd
S. T. Graham	Director and chief general manager, Midland Bank Ltd
E. A. B. Hammond	Executive councillor, Electrical, Electronic, Telecommunications and Plumbing Union
C. A. Hogg	Deputy chairman, Courtaulds Ltd
J. D. Hughes	Vice-principal, Ruskin College, Oxford
S. Thomson	Finance director, Ford Motor Co Ltd
C. H. Urwin	Assistant general secretary, Transport and General Workers' Union

Members of the board receive no payment for their advice and time. They are entitled to claim any necessary travel expenses.

Supply of raw materials

Frank Hooley (Sheffield, Heeley) asked the Secretary of State for Industry if he would set up in his department a strategic intelligence unit to monitor trade in industrial raw materials, advise on any threats to supply and negotiate, as appropriate, long-term bulk contracts with producer countries.

Mr Huckfield replied that his department already kept a close watch on matters affecting the security of supplies of essential raw materials. Responsibility for procurement lay in the first instance with industrial users, but there was continuing and frequent contact between industry and government on the supply situation, including the conditions necessary for the successful negotiation of long-term contracts with producers.

British Shipbuilders

Frederick Willey (Sunderland North) asked the Secretary of State for Industry at which British Shipbuilders' yards joint monitoring committees had been established; and what action was being taken to promote such committees at other yards.

Mr Huckfield said that he understood joint monitoring committees to supplement existing joint consultation procedures with unions had been established in those companies building ships under the Polish contract concluded last year. The corporation had advised him that they were discussing with the CSEU the possible extension of the arrangements to other yards.

Funds for British Aerospace

Cranley Onslow (Woking) asked the Secretary of State for Industry what guarantees had been given to British Aerospace about the availability of public funds to meet the negative cash flow involved in participation in the European Airbus project.

Mr Huckfield replied that the government proposed, subject to the approval of parliament, to make available to British Aerospace up to £50 million under section 45 of the Aircraft and Shipbuilding Industries Act 1977. Apart from this assistance, the investment would be funded, in the same way as the rest of British Aerospace's capital expenditure, from internal resources, and from external sources including a mixture of public dividend capital and loans from the National Loan Fund.

Tuesday, 28 November

Quieter approach procedures

Ernest Perry (Wandsworth, Battersea South) asked the Secretary of State for Trade what progress had been made with trials on quieter approach procedures which commenced on 30 January 1978 at Gatwick Airport.

Mr Clinton Davis said that he understood from the Civil Aviation Authority that the trials had shown that the low power/low drag approaches, which resulted in an appreciable reduction of noise at distances between 11 and 6 miles from touchdown, were feasible and that this part of the procedures was to be adopted as the standard method of approach at Gatwick. The continuous descent approach (CDA) element of the procedures was not yet attainable, but following the installation of secondary surveillance radar at the airport next year further trials of CDA would be considered.

Oil pollution compensation fund

Ernest Perry (Wandsworth, Battersea South) asked whether any decision had been taken on the location of the headquarters of the International Oil Pollution Compensation Fund.

Mr Clinton Davis said that the first assembly of contracting states (of which the United Kingdom was one) had decided last week to locate the headquarters of the fund in London. The government warmly welcomed this decision. The fund would benefit from close association with the Intergovernmental Maritime Consultative Organisation (Imco), also based in London, and from close proximity to the London marine insurance market.

Italian washing machine imports

Dafydd Wigley (Caernarvon) asked the Secretary of State for Trade if he would seek to set up an immediate inquiry into the possible dumping of Italian washing machines into the United Kingdom market at prices below those which are equivalent to the prices freely available for the same machines in Italy.

Mr Meacher said that the concept of dumping between EEC member states did not exist under the treaty of Rome, and he had no powers to make such an inquiry. However, in the context of the Industrial Strategy, the government was in close consultation with the industry on the issues raised by Italian washing machine imports.

Thursday, 30 November

Industrial assistance

Timothy Smith (Ashfield) asked the Secretary of State for Industry if he would list all schemes of industrial assistance available to companies outside the assisted areas; a financed through his department and b financed through the EEC, giving, in each case, the justification for the scheme and the estimated cost in 1978-79.

Mr Huckfield replied that the schemes of assistance set out below were open to companies both inside and outside the assisted areas. All but the last were financed by the government.

SELECTIVE INVESTMENT SCHEME (allocation £150 million): this scheme was introduced to stimulate major investment projects in the manufacturing sector yielding significant benefits to the economy. The estimated cost for 1978/79 was £7.0 million total.

SECTORAL SCHEMES: assistance was provided for individual sectors of industry to meet their specific needs as identified by a detailed analysis of their problems, in close conjunction with the industry itself. Most schemes had provided for assistance for the costs of consultancy and for new investment; some had assisted modernisation and rationalisation of production capacity and the development of new products.

Details of the schemes, still open for applications and an estimate of their costs in 1978-79 were as follows:

£ million

	Estimated cost 1978-79	Total allocation
Drop forging	0.2	5
Footwear	0.2	4.5
Instrumentation and automation	2.0	10
Microelectronics	—	70
Redmeat slaughterhouse	1.1	20
Energy conservation	0.7	25

PRODUCT AND PROCESS DEVELOPMENT SCHEME: this scheme assisted the design, development and launching of new products and processes; it was focused on manufacturing industry with particular emphasis on mechanical and electrical engineering. The estimated cost in 1978-79 was £3.4 million.

MICROPROCESSOR APPLICATION PROJECT (allocation £15 million): this scheme was recently introduced to encourage the use of microprocessors and to help industry to adapt quickly to micro-electronic technology. The estimated cost in 1978-79 was £1 million.

SHIPBUILDING INTERVENTION FUND: against the background of a world-wide recession in shipbuilding the government introduced this scheme to assist UK shipyards to obtain orders. The

estimated cost in 1978-79 was £27.6 million (though most of this would go to assisted areas).

SHIPBUILDING COST ESCALATION INSURANCE SCHEME: this scheme was designed to give UK shipbuilders a measure of protection against exceptional and unpredictable increases in contract costs. The estimated cost in 1978-79 was £4.9 million (again, this would mostly benefit assisted areas in practice).

The only European facility currently available outside the assisted areas was:

EUROPEAN COAL AND STEEL COMMUNITY LOANS: under this scheme concessionary loans were available for projects providing job opportunities in areas affected by closures in the coal and steel industries. No estimate of the amount of loans for 1978-79 was available.

National Enterprise Board

Michael Grylls (North West Surrey) asked the Secretary of State for Industry what was the actual borrowings of the National Enterprise Board and the total amount of overdraft facilities to the National Enterprise Board subsidiary and associated companies, as at 30 November 1978, both of which counted against the limit set under section 8 of the Industry Act 1975.

Mr Kaufman answered that at 6 November 1978, the last date on which the board prepared a certificate for the purposes of borrowing from the secretary of state, the general external borrowing of the board, as defined in section 8(4) of the Industry Act 1975, amounted to £162.132 million. Overdraft facilities available to the board's subsidiaries and associate companies were not a charge against the board's financial limit, as defined in section 8(2) of the act.

Furniture industry code

Andrew Faulds (Warley East) asked the Secretary of State for Prices and Consumer Protection whether the trade associations had agreed to the introduction of the proposed code of practice for the furniture industry; and when he expected its introduction.

Mr Fraser replied that the furniture industry code of practice, which had been drawn up in consultation with the Director General of Fair Trading, had been introduced on 1 August 1978. The code was supported by five trade associations representing furniture manufacturers and retailers: the Branded Furniture Society, the British Furniture Manufacturers Federated Associations, the National Bedding Federation, the National Association of Retail Furnishers and the Scottish House Furnishers Association.

Blood pressure machines

Laurie Pavitt (Brent South) asked the Secretary of State for Trade if he would refuse to issue any further import licences for do-it-yourself blood pressure machines manufactured in the United States of America until the consequences of their import had been studied.

Mr Meacher said that blood pressure machines could be freely imported into the United Kingdom without the need for importers to obtain individual import licences. Although his powers related to the import of all kinds of goods, it was not part of the government's policy that they should be used without justification. The Secretary of State for Social Services had told the house that he had not received any representations about these machines from the medical profession.

Friday, 1 December

Paper products from Efta

John Ovenden (Gravesend) asked what had been the percentage increase in the duty-free quotas for paper products from former European Free Trade Association partners in each year since 1971; and what has been the corresponding increase in home consumption of such products.

Mr Meacher said that prior to 1974, imports into the UK of paper and board products from Efta countries had been admitted duty free without quota. Duty-free quotas were imposed in 1974. The following statistics (see table above) for year-on-year increases in home consumption excluded newsprint, which was covered by a separate EEC quota for all sources:

		Increase in total duty-free quotas	Increase/decrease in apparent home consumption[1]
1974	approx	−27% on this trade for 1973 from Efta sources	+ 4%
1975		9.5%	−25%
1976		1.8%	+18% (53 weeks)
1977		0.7%	+ 1%
1978		1.5%	+ 5% (estimated)

[1] Source: PM 481 for September 1978.

Uganda Airways flights to Stansted

Bruce George (Walsall South) asked the Secretary of State for Trade how many flights had been made to and from Stansted airport by Uganda Airways since 1 January 1977; and if he would list the monthly figures for the time period. Mr George also asked how many flights had been made to and from Stansted airport by Uganda Airways since 1 August; and if he would list the weekly totals for that period.

Mr Clinton Davis gave the following information:

Single leg flights by Uganda Airlines Corporation carrying cargo to and from Stansted airport during period 1 August to 31 September 1978 (weekly totals in brackets)

August	17	(3 3 3 4 4)
September	23	(7 1 10 5)
October	7	(2 2 3 0)
Total	47	

Single leg flights by Uganda Airlines Corporation to and from Stansted airport during period 1 January 1977 to 31 October 1978.

	1977	1978
January	26	16
February	15	12
March	28	24
April	28	12
May	36	17
June	40	16
July	32	9
August	27	17
September	17	23
October	4	7
November	8	
December	14	
Total	275	153

Note: Prior to October 1977 the figures shown are for all movements to and from the airport including flights by empty aircraft.

Anti-pollution in Conway area

Wyn Roberts (Conway) asked the Secretary of State for Trade, if he would arrange that some anti-pollution capability was available in the Conway-Llandudno area, in view of recent oil pollution from the Litopia.

Mr Clinton Davis replied that the tugs at the Anglesey marine terminal were permanently equipped for dispersant spraying and were, therefore, well placed to respond promptly, as in the *Litopia* incident, to any spill at the terminal. His department's stocks of spraying equipment and dispersant for dealing with oil spills at sea were held in or near ports from which the dispersant could obtain suitable spraying vessels at short notice. If necessary these vessels would rapidly join forces with the terminal tugs.

'Litopia' oil spillage

Wyn Roberts (Conway) asked the Secretary of State for Trade, if he would institute an independent inquiry into the oil spillage from the Litopia *at the Anglesey oil terminal, which caused pollution of beaches on the north Wales coast.*

Mr Clinton Davis replied that the oil spillage was from a ruptured discharge hose forming part of the terminal equipment. The contingency arrangements for dealing with such a spill were activated quickly and were largely successful. He had received a report on the operation which was being considered.

'Christos Bitas' oil spill

Dafydd Wigley (Caernarvon) asked the Secretary of State for Trade if he would arrange for and publish a report from his officials on the apparent failure of the performance of the dispersants spraying operation at the Christos Bitas *oil spill.*

Mr Clinton Davis said that the department had published an account of the *Christos Bitas* operation on 27 November, which included a section on the efficiency of the dispersants used. This operation had been very successful, first in that the great bulk of the oil remaining aboard that tanker was pumped off, and second in that dispersant spraying prevented the greater part of the oil that was spilled from coming ashore.

Official what's what

Second edition of the Guide to Official Statistics

The second edition of 'the official what's what', has been produced by the Central Statistical Office. That was one name given to the Guide to Official Statistics when it first appeared in 1976. Now the second edition (HMSO, £8.25) offers a complete update. There is detailed information on 2500 statistical sources covering nearly 800 topics. All official and important non-official publications offering statistics relevant to these subjects are listed in over 400 pages.

All published sources

For each topic there is a full description of all the published sources available – regular publications and special reports, articles and analyses etc with significant statistical content, going back at least a decade.

For each source identified, relevant publication details are listed in a separate bibliography.

An alphabetical index locates the occurrence of 3000 'key words' throughout the main part of the guide. There is also a list of contact points in central government departments for further information.

Major award

The first edition of the guide became the first publication from a government department to win a coveted award from the Library Association – the Besterman medal 'for an outstanding bibliography or guide to the literature'. Over 6000 copies were sold and it firmly established itself on library shelves all over the country as the definitive work on statistical sources.

Updated continuously

The material for the guide is held on computer and has been updated continuously since the first edition was published – every important new publication or article of relevance fed in, described and indexed.

Thousands of separate amendments and additions have been made in maintaining this as a unique and indispensable guide for librarians, researchers and users of all kinds of official statistics. The Open University is currently considering adopting the second edition as a set book.

Important development

This major reference book is regarded as an important development in the service provided by government to potential users of its statistics. In addition it is seen as a significant contribution to the government's general aim of creating easier access to the information it produces.

European community news

Transport ministers agree limited monitoring of liner routes

Monitoring of all liner activities is to be limited to trade routes from the EEC to east Africa and central America, Parliamentary Under-Secretary of State for Trade Stanley Clinton Davis told the commons on 28 November. This was the decision of the transport ministers council held in Brussels on 23 November, he said.

Regrettably, Mr Clinton Davis went on, there was no disposition to proceed at present with the development of countermeasures to meet unfair competition, such as the Soviet threat. 'I expressed the UK's disappointment and urged further consideration of this issue.' His remarks were recorded as a statement in the minutes of the transport council.

Under this decision, member states are obliged to collect information from all carriers on these routes, including the frequency of services operated, the nature and volume of cargo carried and information on transport prices. This information is to be supplied to the commission every six months over a period of two years, beginning on 1 January next year, so that the commission can assess the need to apply counter-measures.

There is a significant Soviet liner presence on the trade route to east Africa, that is, the Besta line, which operates in competition with UK shipping lines within the east African conference.

In answer to a parliamentary question, the minister said he had no plans for further discussions with the Soviet minister. There was no point in this until progress had been made in resolving some of the specific issues of concern to the UK government. One such issue was the Besta line service to east Africa.

The transport ministers agreed to the recommendation on the ratification of the 1978 international convention on the training, certification and watch-keeping of seafarers, encourgaging member states to sign by 1 April 1979, and to ratify by 31 December 1980. They also agreed to a directive concerning the pilotage of vessels by deep sea pilots operating in the North Sea and the English Channel, which is designed to raise the pilots' qualifications and to encourage vessels flying the flag of member states which use a pilot, to employ a qualified one.

Ministers adopted a directive stipulating that all tankers of more than 1600 gross registered tons entering or leaving community ports had to: contact the competent authorities of the member state concerned; report any incident that might affect safety at sea; fill in a checklist; and in the waters adjacent to ports use the services provided by radar and radio stations. This directive also stipulates that if a member state becomes aware of a hazard for a given sea area, it must warn the other member states concerned as quickly as possible.

The council adopted a statement concerning The Hague memorandum, an administrative agreement between the maritime authorities of countries bordering the North Sea. This provides for concerted surveillance procedures in the ports of the countries participating, to check that conditions on board ships visiting these ports are not hazardous to the safety of the ship or the health of the crew.

At present, of the EEC member states, Belgium, Denmark, Germany, France, the Netherlands and the UK participate in The Hague memorandum, and the council welcomed Ireland and Italy's intention of participating in it shortly.

Amongst items which the council asked the permanent representatives committee (Coreper) to look at again in time for its next meeting were: a proposed directive on the limitation of noise emission from subsonic aircraft by a system of noise certification; weights and dimensions of commercial road vehicles; a proposed directive intended to harmonise the laws on driving licences; a directive on adjusting national taxation systems for commercial road vehicles; possible accession to the United Nations convention on a code of conduct for liner conferences; and a proposal for a council regulation on support for projects of community interest in transport infrastructure.

More community news

Information on European community matters and about member states can often be found in other sections of *Trade and Industry*. for this week's additional news, turn to the following pages:

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Special steels: Davignon replies

Commissioner Davignon is examining price practices for special steels on the basis of article 60 of the European Coal and Steel Community (ECSC) treaty, Parliamentary Under-Secretary of State for Trade Michael Meacher told the House of Commons on 27 November. The commissioner is also looking at methods for improving price discipline by the harmonisation of price lists.

This was the basis of the commissioner's reply to the industry secretary, Mr Meacher said. Mr Varley had written on 15 September to Mr Davignon about the Sheffield special steels industry which had suffered badly in the past year from exports from Germany and Italy, and to some extent, from France.

The trade minister said that, although the measures Mr Davignon was now examining were not as much as the government had wanted, the commissioner's reply had been helpful. The government would study it and reply soon.

Answering a question on the government's policy on special industries in difficulty, Mr Meacher said the government sought an extension of the commission's mandatory minimum price policy, which already covered three product groups, and its non-mandatory guidance price system, which covered another five product groups in the steel industry. The government wanted to ensure that special steels were brought within the ambit of this policy, which up to now had been restricted to bulk steels.

Gatt agreement depends on US action – Smith

There can be no question of the EEC concluding a settlement on the general agreement on tariffs and trade (Gatt) until the United States' congressional problem has been solved, trade secretary John Smith told the commons on 27 November.

In this connection, Mr Smith said, the UK and, he thought, the majority of community countries, drew a distinction between the completion of negotiations and the conclusion of an agreement.

The minister, referring to the need for the United States' congress to pass a new bill waiving the imposition of countervailing duties on EEC goods, said that the government accepted the assurances of the United States' administration that it would do what it could to try to resolve the problem. 'In line with, I think, the

majority of community countries, we are happy to see it make such progress as it can.'

Mr Smith said he hoped the negotiators would be able substantially to complete their work by next month, although ratification of their results by the EEC council would have to wait on a satisfactory resolution of the United States' countervailing duty waiver problem.

Aid for young jobless agreed

Ministers attending the social affairs council on 27 November agreed on a regulation creating more aid for young people. The assistance will be paid from the European social fund.

The money, amounting to not more than 30 European units of account (Eua) per week per person for a maximum of 12 months, will be used to recruit and employ unemployed people, under 25 years old, for jobs set up to provide some vocational experience, making it easier for them to find a stable job.

The council was given a brief by the Bremen European council in July 'to decide on measures to combat youth unemployment within the framework of the European social fund so that measures can come into force on 1 January'.

The 1979 draft budget provides for 25 million Eua in payment appropriations and 72 million Eua in commitment appropriations for this, and the council agreed that these sums would be divided equally between the two categories of assistance. The council agreed to instruct the permanent representatives committee (Coreper) to finalise the text so that a formal decision could be taken as soon as possible.

The council took note of the sixth report on the European social fund covering the financial year 1977 and of delegations' comments on it. The report is made up of chapters describing activities by field of intervention, the regional impact of the social fund, pilot experiments and preparatory studies, effectiveness of aid, the social fund committee, the financial and budgetary aspects and the rules governing the tasks and operations of the fund. In addition, the report is supplemented for the first time by national reports giving the results of operations supported financially by the fund in 1977.

The council also took note of the second progress report of the advisory committee on safety, hygiene and health protection at work.

EMS must differ from 'snake' Healey tells house

Greater monetary stability could not be achieved simply through intervention on the currency markets, chancellor Denis Healey said on 29 November at the beginning of the commons debate on the European monetary system. Both sides of the house agreed on this, he claimed.

There were narrow limits to the effectiveness of intervention if it took place in the face of fundamental economic facts that were pushing currencies apart. There had to be more compatibility in the economic performance of members of the system.

That was why, the chancellor said, the government had always supported concerted action to achieve higher growth and lower inflation in the community as a whole. 'We succeeded at Bremen in getting commitments from the main community countries which they carried forward to the meeting at Bonn and which have been the basis of action since then by all concerned.'

Transfer of resources

It was equally essential, he went on, that less prosperous countries should achieve, through the community instruments, a net transfer of resources to themselves from the more prosperous members. The chancellor said he was sorry that agreement had not yet been reached on these vital matters in the discussions.

These discussions so far had focused on the exchange rate regime and the rules for intervention to support it, Mr Healey said. Even here, some important disagreements remained, but important agreements had been reached on, for example, the amount of credit. On the framework of the exchange rate regime, two things had emerged clearly. 'First, we are not talking about a system of fixed exchange rates. The finance ministers have already agreed – and I am sure that the heads of government will endorse their view – that margins of up to 6 per cent between currencies should be available, though it appears that only the Italian government would wish to enter a system with a margin of 6 per cent.'

It was worth pointing out, the chancellor said, that the pound had fluctuated within margins of only 2 per cent over the past two years. A margin of 6 per cent was quite a large margin for fluctuation. In addition to the margins, there had been agreement that realignments of currency parities within the system should take place when necessary. There had been 19 such re-alignments in the snake system during the past five years.

The issues around which the disagreements centred were highly technical and had been described in the green paper, Mr Healey said (*Trade and Industry*, 1 December, page 447). They were also highly important, because the way in which intervention was organised within a currency system would largely decide whether the system assisted growth and jobs in the countries concerned or put further constraints on employment and economic growth. 'I must tell the house that the government would not join a system unless it was likely to assist growth and not to put further constraints on it.

'In our view, if a new exchange rate regime is to assist growth, it must be significantly different from the common float called the snake. That is the view of all the non-snake countries taking part in the discussions. The snake, which has performed a useful role for its surviving members, is basically Germany, with a number of smaller countries with close economic links with Germany – the Benelux countries, Denmark and Norway. The other European countries found it impossible to stay in a system that was so centred on the deutschemark. Italy and Sweden had to leave it, France had to leave it on two occasions, and Britain left only seven weeks after joining.

'I think that it would be disastrous for Europe if we were to repeat the experience of the snake and set up a system which was bound to break down within a few weeks of its being created. It would be disastrous for the countries concerned because all of them had heavy reserve losses when they left the snake on previous occasions, and it would be disastrous for the community as a whole.'

Similar obligations

Mr Healey said that essential difference which the UK government would require in a new exchange rate regime compared with the snake was that it should impose similar obligations on the stronger countries and on the weaker countries.

'That is much easier said than done. Bretton Woods, as a system, was, in theory, supposed to impose the same obligations on the strong as on the weak, but it never operated in that way. What we have been trying to devise is a way of constructing an intervention system which not only imposes an obligation on the stronger countries, but gives them an incentive to take action which otherwise would be lacking.'

Basket of currencies

The means which the government had sought to achieve this objective, the chancellor said, was to use a basket of currencies formed by the European currency unit as an indicator of divergency. An obligation on the divergent currency would then be imposed to take action to bring itself back within the margin without compelling the country at the other end of the parity grid to lose its reserves at the same time. 'That was the great weakness from our point of view of the parity grid system. We also believe, with Italy, that there must be in any new system special treatment of debts incurred by a non-divergent currency country if the divergent currency uses its currency for intervention. In other words, there must be a system by which what we call innocent debt can be frozen.'

The government, regarded these elements in a new exchange rate regime as of critical importance he said. 'Indeed, we could not join a system which did not include these elements. But we do not believe that these changes in the exchange rate regime by themselves will be sufficient. There must also be a commitment – a commitment promised at Bremen – to concerted action to achieve lower inflation and higher growth within the countries which are members of the system and parallel measures to correct the currency perversity in the flow of resources through the community mechanisms, particularly the cap and the community budget. It is on these issues that the disagreement is centred and has yet to be resolved. But discussions are proceeding in almost all the capitals once or twice a day at present to see whether the disagreements can be overcome.'

Directive on social security gives equality in some benefits

Women will be entitled to claim personal social security benefits on the same basis as men within six years, Stanley Orme, Minister for Social Security, said on 28 November. At the social affairs council on 27 November, Mr Orme said, ministers unanimously approved a directive on equal treatment for men and women in social security matters.

There was also unanimous acceptance of a six-year implementation period. Within six years, there had to be complete sex equality for entitlement to personal benefits: both contributory and supplementary benefits and family income supplement; for increases of benefit for dependent children; and for increases of short-term national insurance benefits for dependent adults.

The directive, he said, did not cover the benefits which pensioners could receive for their wives, the wider pension issues such as retirement age, benefits for widows and widowers or the practice of occupational schemes. These were all matters on which further EEC instruments might be drafted in due course, Mr Orme said, but meanwhile member states were free to introduce whatever degree of equality they thought appropriate.

Competition rules: commission decides on blackpowder and guarantees

Agreements setting up a joint-venture company to sell and manufacture blackpowder infringed EEC rules of competition, the European commission has ruled.

The company was to have operated in West Germany under the joint and equal control of Bohlen Industrie AG (Bohlen) and Imperial Chemical Industries Ltd (ICI). A subsidiary of ICI and a subsidiary of Bohlen would have bought from the joint venture their total requirements of those grades of blackpowder manufactured by the company, ICI having gradually phased out its own production of blackpowder.

ICI, almost the sole supplier of blackpowder in the UK, was to have been the exclusive distributor for the joint company in the UK, and Bohlen the exclusive dealer in West Germany.

The commission has decided that this agreement would impair competition in the community and therefore ought not to be implemented.

On receiving the commission's statement of objections both firms abandoned the agreement. The commission considered, however, that it was important to adopt a formal decision banning this agreement in order to clearly establish that it infringed article 85 of the treaty of Rome. Reference 78/921/EEC, 20 October, published in the *Official Journal of the European Communities*, L322, 16 November.

Because of another commission decision any user of a Zanussi electrical household appliance will now be able to benefit from a new Zanussi guarantee, to which the commission has granted negative clearance. The initial version of the guarantee contained certain stipulations which were incompatible with article 85 – mainly because the user of a Zanussi appliance could only obtain satisfaction under the guarantee from the subsidiary which had imported the appliance. Inter-state trade was therefore largely prevented.

Following representations by the commission, Zanussi has introduced a new guarantee scheme covering all its appliances regardless of their origin or trademark. (Zanussi trademarks include 'Zanussi', 'Rex', 'Castor' and 'Zoppas'.) The user can therefore obtain Zanussi appliances in any part of the EEC, without running the risk of losing the guarantee granted in respect of those appliances.

The guarantee may still be refused in certain circumstances, for example, if the appliance has been used or installed incorrectly, and although any alterations to meet technical and safety standards may be made by local Zanussi subsidiaries or other qualified persons, the cost of such alterations will be charged to the user. Reference 78/922/EEC, 23 October, Industrie A. Zanussi SpA (Zanussi), published in the *Official Journal of the European Communities*, L322, 16 November.

Further information can be obtained from the Department of Prices and Consumer Protection, Fair Trading Division 1b, Millbank Tower, Millbank, London SW1P 4QU, tel. 01-211 7037.

Ministers' December programme

EEC council business for December was outlined in the commons on 29 November by Frank Judd, Minister of State at the Foreign and Commonwealth Office.

Heads of state and government met in the European council in Brussels on 4 and 5 December.

Budget council met on 5 December to consider the budgetary implications of the decisions taken by heads of government on the regional development fund.

Finance council will meet on 18 December and will discuss the European monetary system and any follow-up action necessary in the light of decisions reached at the European council. It will also discuss the commission's draft annual report on the economic situation in the community and annual economic review for 1978 to 1979.

Agriculture council will meet on 18 and 19 December and is expected to have a preliminary exchange of views on the CAP price proposals for 1979 to 1980, to consider further the wine market proposals and possibly matters concerning health and hygiene in the milk sector. No fisheries council had yet been arranged, Mr Judd said, but one might prove necessary.

Environment council will meet on 19 December and will hold an additional meeting on 18 December to discuss environment policy generally. The council is expected to consider the pollution of groundwater by dangerous substances, pollution caused by the paper pulp industry, the quality of water for human consumption, bird conservation and the cost of pollution control.

Foreign affairs council will meet on 19 December and will review any need for follow-up action arising from the European council. In addition the council is expected to discuss the Gatt multilateral trade negotiations; current negotiations between the EEC and the Council for Mutual Economic Assistance, and those for a new EEC/ACP Lomé convention; review progress in the negotiations on Greek accession to the community; and resume its discussion on community steel policy.

Energy council will meet on a date still to be decided and will resume its discussion of the community energy situation. The council is also expected to resume consideration of the place of coal in community energy policy; to consider scope for community action in areas of energy labelling and to discuss progress of demonstration projects in energy saving.

Hopes of cfp agreement by end of year – Silkin

No substantive progress was made on UK proposals for preferential access when these were submitted to the fisheries council on 23 and 24 November.

The proposals, put forward in writing by fisheries minister John Silkin, were for an exclusive zone out to 12 miles and for a preference in some of the waters outside 12 miles. Mr Silkin told the house, in a statement on 28 November, that he had made it clear that the UK was ready to enter into constructive discussion on all these matters.

The council had met, the minister said, to discuss the revision of the common fisheries policy and had before it a new document from the commission demonstrating a more flexible attitude. Mr Silkin said this had encouraged him to believe that progress could be made – provided other member states showed understanding of the UK position.

Although no agreement had been reached at this council it remained the government's objective to arrive at an agreement on the common fisheries policy by the end of the year, the minister said.

Customs control form phased out

From today (8 December), goods, which on arrival in the UK are placed at the port or airport of arrival under the full community transit procedure to travel through this country on the way to another member state, need not be covered by a customs control form (no. XS48). This is the effect of an order laid before the House of Commons.

The order – the Customs and Excise (Community Transit Goods) Regulations 1978 (SI 1978 no. 1602) – will not change the position of consignments arriving in the UK from one member state on their way through this country to another member state and which

are already covered at that time by full community transit documents. They do not need the XS48 now. It will not remove the option of traders to use the national control form to transit this country on the way to another member state instead of using the full community transit procedure provided, of course, that this is allowed under the community transit rules.

Some slight additional information will be required on export manifests to identify for statistical purposes the goods covered by these new arrangements.

Customs are amending the relevant public notices. Further information can also be obtainable from the office of any collector of customs and excise at any port or airport.

Public service contracts: UK voices concern

Serious concern has been voiced by the UK government over other member states' lack of compliance with a directive requiring public service contracts worth more than 200 000 European units of account to be advertised throughout the community. The directive came into force on 1 July.

Up to 18 November, the UK had advertised 209 contracts in the *Official Journal*, Denmark had advertised 12, Belgium eight, and France three.

In answer to a written commons question on 24 November, Chief Secretary to the Treasury Joel Barnett said that the government had made clear, both to the commission and to member states, its concern over the present situation. He added that the commission had written to the member states concerned, reminding them of their obligations, and that the commission was considering action under article 169 of the treaty of Rome. The government was keeping the situation closely under review.

Mr Barnett said that the latest indications were that most other member states would have completed their legislative and administrative arrangements for implementing the directive by the end of this year. It was unlikely that contracts advertised by the UK had, so far, led to orders being placed outside this country, he added.

ECSC grant and loan for UK coal industry

Funding from the European Coal and Steel Community is being used to help the UK coal industry.

A grant of over £5.6 million is being made to help nearly 6000 British coal miners and other workers in the coal industry who were made redundant or were transferred during 1977 as a result or pit closure or rundown.

Altogether 5960 workers are affected. Their jobs disappeared as a result of closures at Dalquharran (Scotland), Dudley (north-east England), Barrgoed and Caerau (south Wales), Norton (north-west England), and by mergers and reorganisation at other pits.

In addition, NCB will receive a £10 million loan, approved by the European commission under article 54 of the ECSC treaty. It will help to finance three investment projects. The projects are in Hatfield, Yorkshire, to construct a new coal preparation plant and materials handling facilities; in Wearmouth, north-east England, to modernise surface facilities; and Bilsthorpe, east Midlands, to construct a new coal preparation plant.

The loan will be disbursed in phase with the progress on the projects and the terms of each instalment will depend upon market conditions at the time of disbursement.

Fibre building board dumping probe

An anti-dumping investigation has been opened by the European commission following information received indicating that dumping is being practised or that bounties or subsidies are being granted for imports of fibre building board originating in Czechoslovakia, Poland, Romania or the USSR and that this is causing injury to a community industry. The CCT heading is 44.11.

Views (in writing) should be sent to the Commission of the European Communities, Directorate-General for External Relations, 200 rue de la Loi, B-1049 Brussels, by 30 December 1978 and copies sent to the Department of Trade's Anti-Dumping Unit at Kingsgate House, 66-74 Victoria Street, London SW1E 6SJ.

The full text of the commission's announcement was published in the *Official Journal*, 30 November 1978.

Article 100: checklist of consumer protection directives

This list is new and is additional to the list of article 100 directives which is published quarterly in *Trade and Industry* (see page 69 of 'EEC This is your business', published with this issue). The proposals listed are not themselves new, but relate to general directives dealing with aspects of consumer protection. The list will now be published quarterly.

Subject	Reference of directive or latest draft received	Status (where applicable)
Approximation of the laws of member states on liability for defective products	Com (76) 372 final 23.7.76	Commission proposal OJ 14.10.76
Consumer protection in respect of contracts negotiated away from business premises	Com (76) 544 final 12.1.77 Com (78) 2 final 12.1.78	Commission proposal OJ 29.1.77. Amending commission proposal
Protection of participants in home study courses	Com (77) 404 final 29.7.77 Com (78) 372 final 26.7.78	Commission proposal OJ 31.8.77 Amending commission proposal
Standard terms in consumer contracts	ENV/384/76 August 1976	Preliminary draft
Misleading and unfair advertising	Com (77) 724 final 22.2.78	Commission proposal OJ 21.3.78
Consumer credit	ENV/627/77 March 1977	Preliminary draft
Price display harmonisation	III/755/78 III/775/78 rev 1 4.10.78	Preliminary draft Amended preliminary draft

In addition, there is a commission proposal for a directive on the unit pricing of foodstuffs, Com (77) 171 final: 24.5.77 – *OJ* 14.7.77, and Com (78) 215 final: 25.5.78 which has been put forward under article 235 of the treaty of Rome.

New legislation

The legislation listed below has been published in the *Official Journal of the European Communities* as indicated against each item. The *Official Journal* is published in English and copies should be obtained from HMSO. Information about the items listed, in so far as other member states' requirements are concerned, is available to British exporters from Department of Trade, Export Services and Promotions Division, Export House, 50 Ludgate Hill, London EC4M 7HU, tel. 01-248 5757 ext. 7174/482/408.

Common agricultural policy

The texts of the following regulations which affect the various agricultural sectors in the EEC have been published in the *Official Journal of the European Communities:*

Oils, fats and oilseeds. The *Official Journal* L298, 25 October 1978, contains the following correction to:

Regulation (EEC) 2290/78 laying down detailed rules for the application of the special measures for castor seeds (published in the *Official Journal of the European Communities* L275, 30 September 1978):

Page 86, article 18(2) (c):

for: '. . . for aid under article 6(1) (b) of Regulation (EEC) 1853/78',

read: '. . . for aid under article 6(1) (b) of this Regulation'.

Regulation (EEC) 2742/78 amending for the second time regulation (EEC) 1799/76 in respect of the closing date for the submission of crop declarations for seed flax by substituting '15 December' for '31 October' in Article 9(1) (*Official Journal* L330, 25 November 1978).

Processed agricultural products. Regulation (EEC) 2571/78 determining the amounts of the variable components and additional duties applicable from 1 November 1978 to 31 January 1979 inclusive, on the importation into the community of goods covered by regulation (EEC) 1059/69 (*Official Journal* L308, 1 November 1978).

Wine. Regulation (EEC) 2609/78 amending regulation (EEC) 1931/76 as regards certain distillation operations in the wine sector (*Official Journal* L315, 9 November 1978).

Regulation (EEC) 2695/78 amending for the third time regulation (EEC) 1393/76 laying down detailed rules for the importation of products in the wine-growing sector originating in certain third countries (*Official Journal* L324, 18 November 1978).

Milk and milk products. Regulation (EEC) 2707/78 amending the annex to regulation (EEC) 441/69 as regards the products covered by the special system of refund payments (*Official Journal* L327, 22 November 1978).

Regulation (EEC) 2728/78 temporarily derogating from regulation (EEC) 2213/76 on the sale of skimmed-milk powder from public storage (*Official Journal* L329, 24 November 1978).

Fruit and vegetables. Regulation (EEC) 2644/78 amending Regulation (EEC) 2448/77 in respect of the conditions for the disposal of oranges withdrawn from the market to the processing industry.

Regulation (EEC) 2645/78 fixing the minimum price for selling blood oranges withdrawn from the market to processing industries.

Regulation (EEC) 2646/78 amending regulation (EEC) 1203/73 fixing the conversion factors to be applied to the buying-in prices for fruit and vegetables (*Official Journal* L318, 11 November 1978).

Regulation (EEC) 2655/78 fixing for the 1978/79 marketing year the reference prices for sweet oranges.

Regulation (EEC) 2656/78 fixing for the 1978/79 marketing year the reference price for mandarins (including tangerines and satsumas), clementines, Wilkings and other similar citrus hybrids.

Regulation (EEC) 2657/78 derogating in respect of the 1978/79 marketing year from the common quality standards for brussels sprouts (*Official Journal* L320, 14 November 1978).

Hops. Regulation (EEC) 2709/78 amending annex III to regulation (EEC) 2397/78 on attestations of equivalence for hops imported from non-member countries. (*Official Journal* L327, 22 November 1978).

Beef and veal. Regulation (EEC) 2658/78 amending regulation (EEC) 586/77 laying down rules for the application of levies on beef and veal and amending regulation (EEC) 950/68 on the common customs tariff (*Official Journal* L320, 14 November 1978).

Animal health. The *Official Journal* L329, 24 November 1978 contains the text of decision 78/964/EEC concerning animal health conditions and veterinary certification for imports of fresh meat from Columbia.

Animal feedingstuffs. Regulation (EEC) 2743/78 on the exchange of information between member states and the commission concerning dried fodder (*Official Journal* L330, 25 November 1978).

Regulation (EEC) 2744/78 amending for the second time regulation (EEC) 1528/78 laying down detailed rules for the application of the system of aid for dried fodder (*Official Journal* L330, 25 November 1978).

Directive 78/974/EEC amending the annexes to directive 70/524/EEC concerning additives in feedingstuffs (*Official Journal* L330, 25 November 1978).

Common customs tariff

Regulation (EEC) 2622/78 on the classification of goods falling within subheading 02.01 A(lb)4bb) 33 of the common customs tariff (*Official Journal* L316, 10 November 1978).

Customs regulations

Valuation of goods. The *Official Journal of the European Communities* L330, 25 November 1978, contains the text of regulation (EEC) 2741/78 on postal charges to be taken into consideration when determining the value for customs purposes of goods sent by post.

Further information: H.M. Customs & Excise, Valuation Division, Vintry House, Queen Street Place, London EC4R 1BQ, tel. 01-626 1515 ext 2770.

EEC agreements with Israel and Malta

Trade and Industry, 29 September 1978, (page 733), gave details of EEC funds for the Mediterranean and referred to the protocols dealing with financial and technical co-operation annexed to a number of community association agreements with Mediterranean countries.

The text of regulation (EEC) 2217/78 concerning the conclusion of the additional protocol to the EEC-Israel agreement and of the protocol relating to financial co-operation, with the texts of these protocols which entered into force on 1 November 1978, was published in the *Official Journal of the European Communities*, L270, 27 September 1978.

Information about publication of similar protocols relating to Malta, which also entered into force on 1 November 1978, will be given as soon as it is available.

Copies of the *Official Journal* L270 may be obtained from HMSO, price 60p plus postage.

Further information: Department of Trade, Commercial Relations and Exports Division, 1 Victoria Street, London SW1H 0ET, tel. 01-215 3472.

Imports from non-member states

The *Official Journal of the European Communities* L318, 11 November 1978, contains the texts of the following decision which authorises the relevant member state to refuse entry to the specific goods.

Decision 78/906/EEC authorising France not to apply community treatment to men's and boys' shirts, woven, of wool, of cotton or of man-made textile fibres, falling within heading ex 61.03 of the common customs tariff (Nimexe codes 61.03-11, 15, 19) originating in South Korea and in free circulation in the other member states.

The *Official Journal of the European Communities* L320, 14 November 1978, contains the texts of the following decisions which authorise the relevant member states to refuse entry to the specific goods.

Decision 78/910/EEC authorising the United Kingdom not to apply community treatment to woven fabrics of synthetic fibres (discontinuous or waste) other than narrow woven fabrics, pile fabrics (including terry fabrics) and chenille fabrics falling within subheading 56.07 A of the common customs tariff (Nimexe codes 56.07-01, 04, 05, 07, 08, 11, 13, 14, 16, 17, 18, 21, 23, 24, 26, 27, 28, 32, 33, 34, 36) originating in South Korea and in free circulation in the other member states.

Decision 78/911/EEC authorising the United Kingdom not to apply community treatment to woven fabrics of cotton, other than gauze, terry fabrics, narrow woven fabrics, pile fabrics, chenille fabrics, tulle and other net fabrics falling within heading 55.09 of the common customs tariff (Nimexe codes 55.09-01, 02, 03, 04, 05, 11, 12, 13, 14, 15, 16, 17, 19, 21, 29, 31, 33, 35, 37, 38, 39, 41, 49, 51, 52, 53, 54, 55, 56, 57, 59, 61, 63, 64, 65, 66, 67, 68, 69, 70, 71, 72, 73, 74, 76, 77, 78, 81, 82, 83, 84, 86, 87, 92, 93, 97) originating in Peru and in free circulation in the other member states.

Decision 78/914/EEC authorising the United Kingdom not to apply community treatment to cotton yarn, not put up for retail sale, falling within heading 55.05 of the common customs tariff (Nimexe codes 55.05-13, 19, 21, 25, 27, 29, 33, 35, 37, 41, 45, 46, 48, 52, 58, 61, 65, 67, 69, 72, 78, 92, 98) originating in Brazil and in free circulation in the other member states.

Decision 78/915/EEC authorising France not to apply community treatment to woven fabrics of cotton, other than gauze, terry fabrics, narrow woven fabrics, pile fabrics, chenille fabrics, tulle and other net fabrics falling within heading 55.09 of the common customs tariff (Nimexe codes 55.09-01, 02, 03, 04, 05, 11, 12, 13, 14, 15, 16, 17, 19, 21, 29, 31, 33, 35, 37, 38, 39, 41, 49, 51, 52, 53, 54, 55, 56, 57, 59, 61, 63, 64, 65, 66, 67, 68, 69, 70, 71, 72, 73, 74, 76, 77, 78, 81, 82, 83, 84, 86, 87, 92, 93, 97) originating in South Korea and in free circulation in the other member states.

Decision 78/916/EEC authorising Belgium, Luxembourg and the Netherlands not to apply community treatment to under garments falling within heading 61.03 and 61.04 of the common customs tariff originating in Hungary and in free circulation in the other member states.

The *Official Journal of the European Communities* L324, 18 November 1978, contains the text of the following decision which authorises the relevant member state to refuse entry to the specific goods.

Decision 78/926/EEC authorising the United Kingdom not to apply community treatment to woven fabrics of synthetic fibres (discontinuous or waste) other than narrow woven fabrics, pile fabrics including terry fabrics and chenille fabrics falling within subheading 56.07A of the common customs tariff (Nimexe codes 56.07-01, 04, 05, 07, 08, 11, 13, 14, 16, 17, 18, 21, 23, 24, 26, 27, 28, 32, 33, 34, 36) originating in Taiwan and in free circulation in the other member states.

The *Official Journal of the European Communities* L327, 22 November 1978, contains the texts of the following decisions which authorise the relevant member states to refuse entry to the specific goods.

Decision 78/944/EEC: Authorising Ireland not to apply community treatment to men's and boys' shirts, woven, of wool, of cotton or of man-made textile fibres, falling within heading ex 61.03 of the common customs tariff (Nimexe codes 61.03-11, 15, 19), originating in Bulgaria and in free circulation in the other member states.

Decision 78/945/EEC: authorising Italy not to apply community treatment to essential oils, not terpeneless, of citrus fruit: orange oil, falling within subheading 33.01 ex A of the common customs tariff (Nimexe code 33.01-12), originating in Brazil and in free circulation in the other member states.

Decision 78/946/EEC: authorising Ireland not to apply community treatment to men's and boys' woven breeches, shorts and trousers (including slacks); women's, girls' and infants' woven trousers and slacks, of wool, of cotton or of man-made textile fibres, falling within heading ex 61.01 or subheading ex 61.02 B of the common customs tariff (Nimexe codes 61.01-62, 64, 66, 72, 74, 76; 61.02-66, 68, 72), originating in Singapore and in free circulation in the other member states.

Decision 78/950/EEC: authorising France not to apply community treatment to woven suits (including co-ordinate suits consisting of two or three pieces, which are ordered, packed, consigned and normally sold together), of wool, of cotton or of man-made textile fibres, falling within heading ex 61.01 of the common customs tariff (Nimexe codes 61.01-51, 54, 57), originating in Yugoslavia and in free circulation in other member states.

The *Official Journal of the European Communities* L328, 23 November 1978, contains the texts of the following decisions which authorise the relevant member states to refuse entry to the specific goods.

Decision 78/958/EEC: authorising France not to apply community treatment to men's and boys' shirts, woven, of wool, of cotton or of man-made textile fibres, falling within heading ex 61.03 of the common customs tariff (Nimexe codes 61.03-11, 15, 19), originating in Sri Lanka and in free circulation in the other member states.

Decision 78/961/EEC authorising Italy not to apply community treatment to undergarments, knitted or crocheted, not elastic or rubberised: shirts, T-shirts, lightweight fine knit roll, polo or turtle necked jumpers, pullovers, undervests and the like, knitted or crocheted, not elastic or rubberised, other than babies' garments, of cotton or synthetic textile fibres; T-shirts and lightweight fine knit roll, polo or turtle necked jumpers and pullovers, of regenerated textile fibres, falling within heading ex 60.04 of the common customs tariff (Nimexe codes 60.04-01, 05, 13, 18, 28, 29, 30, 42, 50, 58), originating in Macao and in free circulation in the other member states.

Decision 78/962/EEC: authorising France not to apply community treatment to men's and boys' outer garments: men's and boys' woven jackets and blazers, of wool, of cotton or of man-made textile fibres, falling within heading ex 61.01 of the common customs tariff (Nimexe codes 61.01-34, 36, 37), originating in Romania and in free circulation in the other member states.

The *Official Journal of the European Communities* L329, 24 November 1978, contains the texts of the following decisions which authorise the relevant member states to refuse entry to the specific goods.

Decision 78/966/EEC: authorising the United Kingdom not to apply community treatment to handkerchiefs (excluding embroidered handkerchiefs) of woven cotton, man-made fibres or flax, falling within heading ex 61.05 of the common customs tariff, originating in Czechoslovakia and in free circulation in the other member states.

Decision 78/970/EEC: authorising the United Kingdom not to apply community treatment to cotton tea-towels falling within heading ex 62.02 of the common customs tariff, originating in the People's Republic of China and in free circulation in the other member states.

Review of CCT tariff suspensions in the agricultural and industrial sectors

The Department of Trade has been notified by the EEC commission that a review will take place early in 1979 of existing total or partial suspensions of the CCT (common customs tariff) which are due to expire on 30 June 1979. Details are given below. Unless any objections are raised it is the intention that all these suspensions should generally be maintained for a further period ending in most cases on 30 June 1980.

The department will wish to take account of UK interests in making its views known to the EEC before decisions are taken whether to continue the suspensions. UK producers of the goods in question or of like or competing products are entitled to object where they consider that they are able to supply the whole or the greater part of the needs of the community and that their interests would be adversely affected by the loss of protection involved in a suspension of the CCT. Those wishing to object should provide as much as possible of the following information *for the years 1979 and 1980:*

1 estimated community (nine countries including the UK) demand;
2 estimated UK demand;
3 UK production expected to be available for:
  3.1 the UK market
  3.2 the rest of the community
  3.3 exports to other countries

This information should be sent in writing to the Department of Trade, General Division, Room 332, Kingsgate House, 66-74 Victoria Street, London SW1E 6SJ in time to arrive not later than 29 December 1978.

Inquiries: 01-215 3576.

CCT heading No./Description	CCT suspended rate of duty %
03.01 A Ib) Salmon, fresh (live or dead) chilled or frozen	0
ex 03.01 Bid) Sardines (*Clupea pilchardus Walbaum*), fresh, chilled or frozen, whole, of a length of 20 cm or more *	0
ex 03.01 Bie) Piked dog-fish (*Squalus acanthias*), fresh, chilled or frozen, whole, headless or in pieces	0
ex 03.01 Big) Lesser or Greenland halibut (*Hippoglossus reinhardtius*), fresh, chilled or frozen, whole, headless or in pieces	0
ex 03.01 Bih) Cod (*Gadus morrhua or Gadus callarias*), fresh, chilled or frozen, whole, headless or in pieces, intended for processing	9
ex 03.01 Bik) Haddock, fresh, chilled or frozen, whole, headless or in pieces, intended for processing	9
ex 03.01 Bil) Hake (*Merluccius spp*), fresh, chilled or frozen, whole, headless or in pieces, intended for processing	9
ex 03.01 Biq) Sardinops sagax or ocellata (pilchards) fresh, chilled or frozen, whole, of a length of 20 cm or more, intended for the processing industry	4

Letters to the editor

Letters to the editor should be addressed to the Editor, *Trade and Industry*, Eighth floor, 1 Victoria Street, London SW1H 0ET, and *not* to HMSO.

CCT heading No./Description	CCT suspended rate of duty %
ex 03.01 BIq) Flaps of Sardinops sagax or ocellata (pilchards) fresh, chilled or frozen, of a length of 12 cm or more, intended for the processing industry	0
ex 03.01 BIq) Sturgeons, fresh, chilled or frozen, whole, headless or in pieces, intended for the processing industry	0
ex 03.01 BIIa) and BIIb)1 Fillets of cod (*Gadus morrhua or Gadus callarias*), fresh, chilled or frozen, intended for processing	9
ex 03.01 BIIa) and BIIb)3 Fillets of haddock, fresh, chilled or frozen, intended for processing	9
ex 03.01 BIIa) and BIIb)7 Fillets of hake (*Merluccius spp*), fresh, chilled or frozen, intended for processing	0
ex 03.01 BIIa) and BIIb)7 Fillets of herring, fresh, chilled or frozen, intended for the processing industry	0
ex 03.01 C Hard fish roes, fresh, chilled or frozen	0
ex 03.02 AIa) Herring, dried, salted or in brine, whole, headless or in pieces, intended for the processing industry	0
ex 03.02 AIc) Anchovies (*Engraulis spp*) salted or in brine, whole, headless or in pieces, in packings of a net capacity of 8 kg or more	0
03.02 AIe) Salmon, salted or in brine, whole, headless or in pieces	4
ex 03.02 AIf) Coalfish (*Pollachius virens* or *Gadus virens*), salted or in brine, whole, headless or in pieces, intended for the processing industry	7
ex 03.02 AIf) Sprats, salted or in brine, whole, headless or in pieces	0
ex 03.02 AIId) Fillets of coalfish (*Pollachius virens* or *Gadus virens*), salted or in brine	7
ex 03.02 AIId) Fillets of herring, dried, salted or in brine, intended for the processing industry	0
ex 03.02 C Hard fish roes, salted or in brine	0
ex 03.03 AI Tails of crawfish, chilled or frozen, shelled or not	10
ex 03.03 BIb) Oysters, fresh (live), weighing no more than 12 g each	0
ex 03.03 BIb) Oysters, fresh (live), of the *Crassostrea gigas* variety, weighing more than 100 g each	0
07.01 GIII Horse-radish (*Cochlearia amoracia*), fresh or chilled	7
ex 07.03 E Mushrooms, excluding cultivated mushrooms, preserved in brine, in sulphur water or in other preservative solutions, but not specially prepared for immediate consumption	0
ex 07.04 B Mushrooms, excluding cultivated mushrooms, dried, dehydrated or evaporated, whole or in identifiable pieces or slices, intended for the processing industry	0
ex 07.04 B Sweet red peppers, dried, dehydrated or evaporated, whole, cut or sliced, but not further prepared	0
ex 07.05 BI Beans, dried, white or the special *Phaseolus vulgaris*	0
ex 08.01 A Dates, fresh or dried, in immediate packings of a net capacity not exceeding 35 kg, for repacking for retail sale	0
ex 08.01 A Dates, fresh or dried, intended for processing other than for the production of alcohol	0
ex 08.09 Rose-hips, fresh	0
ex 08.10 A Bilberries (fruits of *Vaccinium myrtillus*), whether or not cooked, preserved by freezing, not containing added sugar	4
ex 08.10 B Blue-black fruits of the species *Vaccinium*, other than those of *Vaccinium myrtillus*, whether or not cooked, preserved by freezing, not containing added sugar	4
ex 08.10 B Cranberries (fruits of *Vaccinium vitis idaea*), whether or not cooked, preserved by freezing, not containing added sugar	0
ex 08.01 B Red or rose fruits of the species *Vaccinium*, other than those of *Vaccinium vitis idaea*, whether or not cooked, preserved by freezing, not containing added sugar	0
ex 08.10 B Rose-hips, whether or not cooked, preserved by freezing, not containing added sugar	0
ex 08.10 B Dates, frozen in immediate packings of a net capacity of 5 kg or more, not intended for the production of alcohol	0
ex 09.04 BI Paprika, ground, for use in animal feedingstuffs	0
09.10 CI Saffron, neither crushed nor ground	10
ex 13.03 AV Extract of dewaxed pyrethrum	0
ex 16.04 AII Hard fish roes, washed, cleaned of adherent organs and simply salted or in brine	0
ex 16.04 B Salmon, intended for the processing industry for further manufacture into pastes or spreads	0
ex 16.04 CII) Spiced and salted herrings, in packings of a net capacity of 10 kg or more, intended for the processing industry	0
ex 16.04 CII 'Herring-flaps', prepared or preserved in vinegar, in packings of a net capacity of 10 kg or more, intended for the processing industry	0
ex 16.05 A Crabs of the 'King', 'Hanasaki', 'Kegani' and 'Queen' varieties, simply boiled in water and shelled, whether or not frozen, in packings of a net capacity of 2 kg or more, intended for the processing industry	0
ex 16.05 A Crabs, excluding the species *Cancer pegarus*, simply boiled in water and shelled, whether or not frozen, in packings of a net capacity of 2 kg or more, for repacking for retail sale	5
ex 16.05 B Shrimps and prawns other than those of the Crangon variety, boiled in water and shelled, whether or not frozen or dried, intended for the industrial manufacture of products falling within heading no 16.05	10
23.07 A Fish or marine mammal solubles	0
ex 26.04 CIII Tellurium in powder or ingots	0
ex 26.13 IJ Tellurium dioxide	0
ex 26.21 Chromium dioxide	0
ex 28.31 C Lithium hypochlorite	0
ex 28.38 C Potassium hydrogenperoxomonosulphate	0
ex 28.42 AVI Lithium carbonates not corresponding to the following specifications: in the form of a white powder and containing 98.5 per cent or more of Li_2CO_3 and; less than 2 ppm of arsenic; less than 200 ppm of calcium; less than 200 ppm of chlorides; less than 20 ppm of iron; less than 150 ppm of magnesium; less than 20 ppm of heavy metals; less than 300 ppm of potassium; less than 300 ppm of sodium; less than 200 ppm of sulphates	0
28.46 AIb) Sodium borates, anhydrous	0
ex 28.48 BIII Dialuminium hexamagnesium carbonate decahydroxide tetrahydrate	0
28.51 A Deuterium, heavy water and other compounds of deuterium; hydrogen and compounds thereof, enriched in deuterium; mixtures and solutions containing these products (*Euratom*)	0
ex 28.55 A Iron phosphides (ferro-phosphorus) containing 15 per cent or more by weight of phosphorus, for use exclusively in the manufacture of refined phospheric iron or steel	0
ex 28.57 B Manganese nitride containing not more than 8 per cent of nitrogen by weight	0
ex 29.01 CI *beta*-Pinene	0
ex 29.01 DVI Vinyltoluenes	0
ex 29.02 AIIb) 1,2,3-Trichloropropenes	0
ex 29.02 AIII Vinyl bromide	0
ex 29.02 AIII 1,2-Dibromoethane	4
ex 29.02 AV Bromochloromethane	0
ex 29.02 B 1,6,7,8,9,14,15,16,17,17,18,18-Dodecachloropentacyclo[12.2.1.1^{6,9}.0^{2,13}.0^{5,10}]octadeca-7, 15-diene, intended for use in the manufacture of polyamide 6-6 or polypropylene	0
ex 29.02 B Hexachlorocyclopentadiene	0
ex 29.03 BII Nitromethane	0
ex 29.03 BII 1-Nitropropane	8
ex 29.03 BII 2-Nitropropane	8
ex 29.04 CI Butane-1,3-diol	0
ex 29.04 CV 2,2-Bis(bromomethyl) propanediol	0
ex 29.05 AIII Inositols	0
ex 29.06 AIV 2-*tert*-Butyl-4-ethylphenol	0
ex 29.06 AIV 2-Isopropylphenol	6
ex 29.06 BV 4,4-(2,3-Dimethyltetramethylene)dipyrocatechol, not less than 98 per cent pure	0
ex 29.06 BV 2,5-Di(*tert*-phenyl)hydroquinone	0
ex 29.06 BV 6,6',6''-Tri-*tert*-butyl-4,4',4''-(1-methylpropan-1-yl-3-ylidene)tri-*m*-cresol, whether or not containing toluene of crystallisation	0
ex 29.08 AIIIc) 1,2-Bis(2,4,6-tribromophenoxy)ethane	0
ex 29.08 AIIIc) Bis(phenoxyphenoxy)benzene, mixed isomers	0
ex 29.08 AIIIc) Sodium 4-(2-methylallyloxy)benzenesulphonate	0
ex 29.08 D Bis(*alpha,alpha*-dimethylbenzyl)peroxide	0
ex 29.08 D *tert*-Butyl hydroperoxide, aqueous solution	0
ex 29.09 1,2-Epoxybutane	7
ex 29.13 AI 5-Methylhexan-2-one	0
ex 29.13 BIb) Refined natural camphor	0
ex 29.13 DI 3-*beta*-Hydroxy-16-*alpha*-methylpregn-5-en-20-one	6
ex 29.13 DI 11-*alpha*,17,21-Trihydroxy-16-*beta*-methylpregna-1,4-diene-3,20-dione	0
ex 29.13 F 1,4-Naphthoquinone	0
ex 29.13 GII Chlordecone (ISO)	0
ex 29.14 AIIc)4 20-Oxopregna-5,16-dien-3-*beta*-yl acetate	0
ex 29.14 AIIc)4 16-*alpha*,17-*alpha*-Epoxy-20-oxopregn-5-en-3-*beta*-yl acetate	6
ex 29.14 AIIc)4 11-*alpha*,17-*alpha*,21-Trihydroxy-16-*alpha*-methyl-5-*alpha*-pregnane-3,20-dione 21-acetate 11-(toluene-4-sulphonate)	9
ex 29.14 AIIc)4 11-*beta*,17,20,21-Tetrahydroxy-6-methylpregna-1,4-dien-3-one 21-acetate	0
ex 29.14 AXI 2,2'-Ethylenedioxydiethyl bis (2-ethylbutyrate)	0
ex 29.14 BIVb) Butyl perchlorocrotonate	0
ex 29.15 AIVa) Azelaic acid	0
ex 29.15 AIVa) Sebacic acid	0
ex 29.15 CIII Benzene-1,2,4-tricarboxylic acid	0
ex 29.15 CIII Benzene-1,2,4-tricarboxylic acid 1,2-anhydride	0
ex 29.15 CIII Tetrachlorophthalic anhydride	0
ex 29.15 CIII Benzyl 3-isobutyryloxy-1-isopropyl-2,2-dimethylpropyl phthalate	0
ex 29.16 AII L-Malic acid and its salts and esters	0
29.16 AIIIa) Crude calcium tartrate	3.5
ex 29.16 AVIIIa) 2,2-Bis(hydroxymethyl)propionic acid	0
ex 29.16 BIII 2-Ethylhexyl 4-hydroxybenzoate	0
ex 29.16 BVI Octadecyl 3-(3,5-di-*tert*-butyl-4-hydroxyphenyl)-propionate	0
ex 29.16 BVI Sodium 5-(2,4-difluorophenyl)salicylate	0
ex 29.16 BVI Pentaerythritol tetrakis [3-(3,5-di-*tert*-butyl-4-hydroxyphenyl)propionate]	0
ex 29.16 D Dinoprostone (INN)	0

CCT heading No./Description	CCT suspended rate of duty %
ex 29.19 C	
2,2-Bis(chloromethyl)trimethylene tetrakis(2-chloroethyl) di(phosphate)	0
ex 29.22 BII	
N,N,N',N',-Tetrabutylhexamethylenedaimine	0
ex 29.22 DI	
3,5-Dichloroaniline	0
ex 29.22 EII	
1,8-Naphthylendiamine	0
ex 29.22 EII	
m-Phenylenebis(methylamine)	0
ex 29.23 AII	
(+)-4-Dimethylamino-3-methyl-1,2-diphenyl-butan-2-ol	0
ex 29.23 AII	
Bis(2-dimethylaminoethyl) ether	0
ex 29.23 AII	
Dinoprost (INN), Trometamol salt (INN)	0
ex 29.23 BII	
3-Chloro-4(4-chlorophenoxy)aniline	6
ex 29.23 C	
Ketamine (INN) hydrochloride	0
ex 29.23 DV	
beta-Alanine	0
ex 29.23 DV	
Tranexamic acid (INN)	0
ex 29.23 DV	
Sodium 2-cyclohexa-1,4-dienyl-*N*-(2-methoxycarbonyl-1-methylvinyl)glycinate	0
ex 29.23 DV	
3,5-Diaminobenzoic acid	0
ex 29.23 E	
4-(2-Hydroxy-3-isopropylaminopropoxy)-2,3,6-trimethylphenyl acetate	0
ex 29.23 E	
N-Benzyl-*N*-(3-hydroxybenzoylmethyl)methyl-ammonium chloride	0
ex 29.23 E	
Methyldopa (INN)	0
ex 29.23 E	
Diethyl 1,3-benzodioxol-5-ylaminomethyl-enemalonate	0
ex 29.23 E	
6-Acetyl-1,3-benzodioxol-5-ylammonium chloride	0
ex 29.25 AII	
(3-Methacrylamidopropyl)trimethylammonium chloride	0
ex 29.25 AII	
N-Acetyl-*DL*-valine	0
29.25 BIIa)	
5-Ethyl-5-phenylbarbituric acid (phenobarbital) and its salts	11
ex 29.25 BIIIb)	
2'Benzoyl-4'-chloro-*N*-(2-hydroxypropyl)-glycinanilide	0
ex 29.26 AI	
O-Benzoicsulphimide (saccharin) and its sodium salt	8
ex 29.27	
4-Bromophenylacetonitrile	0
ex 29.27	
(-)-*N*-(*alpha*-Cyano-4-hydroxy-3-methoxy-*alpha*-methylphenethyl)acetamide	0
ex 29.27	
2-(3-Phenoxyphenyl)propiononitrile	0
ex 29.29	
20-Hydroxyiminopregna-5,16-dien-3-yl acetate	0
ex 29.29	
(-)-2(3,4-Dihydroxybenzyl)-2hydrazinopropionic acid	0
ex 29.29	
1,3-Bis(4-ehlorobenzylideneamino)guanidinium chloride	0
ex 29.29	
N,N-Diethylhydroxylamine	0
ex 29.30	
O,O-Bis(4-*tert*-butylphenyl) *N*-cyclohexylphos-phoramidothiate	0
ex 29.31 B	
Cyclohexanethiol	0
ex 29.31 B	
5-Fluoro-2-methyl-1-(4-methylthiobenzylidene)-inden-3-ylacetic acid	0
ex 29.31 B	
N,N-Diethyl-2-mercaptoethylammonium chloride	0
ex 29.31 B	
Octadecyl (4-hydroxy-3,5-dimethylbenzylthio)-acetate	0
ex 29.31 B	
2-Methyl-2-(methylthio)propionaldehyde oxime	0
ex 29.31 B	
4-(Methylthio)phenol	0
ex 29.31 B	
Thiophenol	0
ex 29.31 B	
Tolnaftate (INN)	0
ex 29.34 C	
O-Ethyl phenylphosphonochloridothioate	0
ex 29.34 C	
Dimethyltin dichloride	0
ex 29.34 C	
Trichloronat (ISO)	0
ex 29.35 Q	
2-Acetyl-1,4-butyrolactone	0
ex 29.35 Q	
Amprolium (INN) hydrochloride	0
ex 29.35 Q	
Methyl-3-amino-5,6-dichloropyrazine-2-carboxylate	0
ex 29.35 Q	
2-Chloro-10*H*-dibenz[*b,f*][1,4]oxazepin-11-one	0
ex 29.35 Q	
6-Methoxybenzothiazol-2-ylamine	0
ex 29.35 Q	
4-Nitrobenzyl 7-amino-3-methyl-8-oxo-5-thia-1-azabicyclo[4.2.0]oct-2-ene-2-carboxylate and its salts	0
ex 29.35 Q	
2-Benzotriazol-2-yl-4-(1,1,3,3-tetramethylbutyl)-phenol	0
ex 29.35 Q	
2-Benzotriazol-2-yl-*p*-cresol	0
ex 29.35 Q	
2,6-Di-*tert*-butyl-4-[4,6-bis(octylthio)-1,3,5-triazin-2-ylamino] phenol	0
ex 29.35 Q and ex 30.03 AIIb)	
Butorphanol (INN) and its salts	0
ex 29.35 Q	
(-)-1-*tert*-Butylamino-3-(4-morpholino-1,2,5-thiadiazol-3-yloxy)propan-2-ol	0
ex 29.35 Q	
Clotiazepam (INN)	0
ex 29.35 Q	
1,4-Diazabicyclo [2.2.2] octane (triethylenediamine	0
ex 29.35 Q	
2,4-Di-*tert*-butyl-6-(5-chlorobenzotriazol-2-yl) phenol	0
ex 29.35 Q	
Carpipramine (INN) dihydrochloride	0
ex 29.35 Q	
2,3-Dihydro-2,2-dimethylbenzofuran-7-ol	0
ex 29.35 Q	
1-Ethyl-1,4-dihydro-4-oxo[1,3]dioxolo[4,5-g] cinnoline-3-carbonitrile	0
ex 29.35 Q	
Indometacin (INN)	0
ex 29.35 Q	
Diphemanil metilsulphate (INN)	0
ex 29.35 Q	
Minoxidil (INN)	0
ex 29.35 Q	
Orazamide (INN)	0
ex 29.35 Q	
(25*R*)-Spirost-5-en-3-*beta*-ol (diosgenin) and its esters	0
ex 29.35 Q	
1,3,5-Triacryloylperhydro-1,3,5-triazine	0
ex 29.35 Q	
Triazolam (INN)	0
ex 29.35 Q	
L-Tryptophan	0
ex 29.36	
Quinethazone (INN)	0
ex 29.36	
Sulfaguanidine (INN)	0
ex 29.36	
Sulfathiazole (INN)	0
ex 29.38 BII	
Panthenol (INN)	0
ex 29.38 BIII	
Folic acid (INN)	0
ex 29.39 CI	
Serum gonadotrophin (INN)	0
ex 29.39 DII	
Betamethasone (INN) 21-acetate	0
ex 29.39 DII	
Triamcinolone (INN) acetonide	8
ex 29.39 DII	
Betamethasone (INN) 17,21-dipropionate	0
ex 29.39 DII	
Triamcinolone (INN) 16-*alpha*,21-diacetate	8
ex 29.39 DII	
Fluorometholone (INN)	0
ex 29.39 DII	
Halcinonide (INN)	0
ex 29.39 DII	
Triamcinolone hexacetonide (INN)	8
ex 29.39 DII	
Methylprednisolone (INN)	8
ex 29.39 DII	
Triamcinolone (INN)	8
ex 29.39 E	
Calcitonin (INN), porcine	0
ex 29.39 E	
Calcitonin (INN), salmon-type, and its salts	0
ex 29.39 E	
Calusterone (INN)	0
ex 29.39 E	
Prasterone (INN)	0
ex 29.42 CVII	
Pilocarpine hydrochloride	0
ex 29.42 CVII	
Pilocarpine nitrate	0
ex 29.42 CVII	
(22*R*,25*R*)-Tomat-5-enin-3-*beta*-ol (Solasodine)	0
ex 29.44 A	
Epicillin (INN)	0
ex 29.44 C and ex 30.03 AIIb)	
Amikacin (INN) and its salts	0
ex 29.44 C	
Amphotericin B (INN)	0
ex 29.44 C	
Sodium (7*S*)-3-carbamoyloxymethyl-7-methoxy-8-oxo-7-[2-(2-thienyl)acetamido]-5-thia-1-azabicyclo [4.2.0] oct-2-ene-2-carboxylate	0
ex 29.44 C	
Cefaclor (INN) and its hydrates, salts and esters	0
ex 29.44 C	
Cefradine (INN)	0
ex 29.44 C	
Cefazolin (INN) and its salts	0
ex 29.44 C	
Minocycline (INN) *mono*-hydrochloride dihydrate	0
ex 29.44 C	
Clindamycin (INN) and its salts and esters	0
ex 29.44 C	
Lincomycin (INN) and its salts and esters, intended for the manufacture of products falling in heading 30.03	0
ex 29.44 C	
Spectinomycin (INN) dihydrochloride pentahydrate	0
ex 29.44 C	
Gentamicin (INN) and its salts	0
ex 29.44 C	
Monensin (INN) and its salts	0
ex 29.44 C	
Nystatin (INN)	0
ex 29.44 C and ex 30.03 AIIb)	
Bleomycin (INN) sulphate	0
ex 29.44 C	
Sisomicin (INN) sulphate	0
ex 29.44 C	
Spectinomycin (INN) sulphate	0
ex 29.44 C	
Tobramycin (INN) and its salts	0
ex 29.45	
Potassium *tert*-butoxide	0
ex 30.01 AI	
Bovine livers for organotherapeutic purposes, dried and powdered	5
ex 30.01 B	
Mixture of oestrogens of equine origin	0
ex 30.01 B	
Human glands or other human organs	0
ex 30.01 B	
Extracts of liver of bovine animals	5
ex 30.01 B	
Extracts of suprarenal glands	0
ex 30.01 B	
Lyophilised *gamma*-globulin derived from human blood	0
ex 30.01 B	
The following substances derived from human blood: antihaemophilic globulin, anti-Rh_o(D)-globulin and plasmaprotein solution	0
ex 30.01 B	
Anti-D immunoplasma	0
ex 30.01 B	
Albumin in crude paste form derived from human blood	0
ex 30.01 B	
gamma-Globulin, in solution, derived from human blood	0
ex 30.01 B	
gamma-globulin, crude paste	0
ex 30.01 B	
Human plasma	0
ex 30.01 B	
Human serum	0
ex 30.01 B, ex 30.03 AIIb) and 30.03 BIIb)	
Human albumin, whether or not in solution	0
ex 30.01 B, ex 30.03 AIIb) and ex 30.03 BIIb)	
Human fibrinogen	0
ex 30.02 A	
Tetanus immunoglobulin	0
ex 30.02 A	
Anti-tetanus immunoplasma	0
ex 30.03 AIIb) and ex 30.03 BIIb)	
Preserved serum prepared on a basis of human blood	0
ex 30.03 AIIb) and ex 30.03 BIIb)	
Anti-haemophilic globulin and anti-Rh_o(D) globulin derived from human blood	0
ex 30.03 BIIb)	
gamma-globulin, in solution, derived from human blood	0
ex 30.03 BIIb)	
Lyophilised *gamma*-globulin derived from human blood	0
32.01 AI	
Tanning extracts of wattle (mimosa)	0
ex 32.01 AIV	
Tanning extracts of eucalyptus	4
ex 32.01 AIV	
Tanning extracts derived from gambier and myrobolan fruits	0
ex 32.08 D	
Glass in the form of flakes of a length not less than 0.1 and not more than 3.5 mm and of a thickness not less than two and not more than five micrometers	0
ex 34.02	
(Alkyl, C_{12}-C_{18}) benzylbis (2-hydroxypropyl) ammonium chloride	0

CCT heading No./Description	CCT suspended rate of duty %
ex 35.07 Bromelains (INN)	0
ex 35.07 Mixture of streptokinase (INN) and streptodornase (INN)	0
ex 35.07 Peroxidase	0
ex 37.02 B Colour negative film of a width not less than 75 mm and not more than 105 mm and of a length of 100 m or more, suitable for use in the manufacture of 'instant picture' film packs	0
ex 38.03 B Acid activated montmorillonite which, when examined by X-ray powder diffraction, shows four principal lines corresponding to crystal interplanar spacing (d values) of 0.44, 0.40, 0.33 and 0.25 nm, the line corresponding to 0.40 nm being the most intense	0
38.07 A Gum spirits of turpentine	3
38.07 B Spirits of sulphate turpentine; crude dipentene	3
38.07 C Spirits of wood turpentine; terpenic solvents produced by the distillation or other treatment of coniferous woods; sulphite turpentine; pine oil (excluding 'pine oils' not rich in terpineol)	3
ex 38.08 C Hydroabietyl alcohol	0
ex 38.08 C Rosin, hydrogenated, polymerised, dimerised or oxidised	4
ex 38.19 G Catalysts consisting of copper chloride supported on aluminium oxide for the preparation of dichloroethane from ethylene, hydrochloric acid and oxygen	0
ex 38.19 G Catalysts consisting of bis(2-dimethylaminoethyl) ether dissolved in 1,1'-oxydipropan-2-ol	0
ex 38.19 G Catalysts consisting essentially of diphosphorus pentaoxide on an inert support	0
ex 38.19 G Catalysts, in the form of granules or rings having a diameter of not less than 3 mm and not more than 10 mm, consisting of silver supported on aluminium oxide, the silver content being not less than 10% and not more than 20% by weight	0
ex 38.19 K Sintered magnesite mixed with small quantities of mineral oils	0
ex 38.19 U Flame-retardant reaction products of acetaldehyde, ethylene oxide and phosphorus trichloride	0
ex 38.19 U Intermediate products from the manufacture of monensin salts	0
ex 38.19 U Grains consisting of a mixture of dialuminium trioxide and zirconium dioxide containing by weight not less than 70% and not more than 78% dialuminium trioxide and not less than 19% and not more than 26% of zirconium dioxide	7.6
ex 38.19 U Grains consisting of a mixture of dialuminium trioxide and zirconium dioxide containing by weight not less than 54% and not more than 62% dialuminium trioxide and not less than 36% and not more than 44% zirconium dioxide	7.6
ex 38.19 U *N*-(2-methyl-2-nitropropyl)-4-nitrosoaniline containing not less than 65% by weight of an inert filler	0
ex 38.19 U Calcined bauxite (refractory grade)	0
ex 38.19 U Diosgenin crude	0
ex 38.19 U 4-(6-Fluoro-2-methylinden-3-ylmethyl)phenyl methyl sulphide, dissolved in toluene	0
ex 38.19 U Tetramethylammonium hydroxide dissolved in methanol	0
ex 38.19 U Mixture of x-butyl-4,4'-isopropylidenediphenol and x,x'-dibutyl-4,4'-isopropylidenediphenol	0
ex 38.19 U Mixture of nitromethane and 1,2-epoxybutane	4
ex 38.19 U Mixture of 4-octyldiphenylamine and 4,4'-dioctyldiphenylamine	0
ex 38.19 U Reaction products containing not less than 55% by weight of 2-(2-*p*-chlorophenylbenzoxazol-5-yl) propiononitrile	0
ex 38.19 U Mixture of tertiary thiols	9
ex 39.01 Colestipol (INN) hydrochloride	0
ex 39.01 CIII, ex 39.03 BIIb)2, BIIIb)4aa) and BIVb)4aa) Waste and scrap of photographic (including cinematographic) and X-ray film	0
ex 39.01 CIII Reflecting polyester sheeting, whether or not in rolls	0
ex 39.01 CIII Waste and scrap of polyester sheets coated with tungsten compounds	0
ex 39.01 CIII Film base, in rolls, of polyethylene terephthalate, for cinematography or photography (including radiography)	8
ex 39.01 CV Polyurethane pre-polymers, in the forms mentioned in Note 3(a) to Chapter 39 containing not less than 3.9 and not more than 4.3 per cent of isocyanate by weight and having a viscosity at 100° C of not less than 500 and not more than 600 centipoises based on *alpha*-(4-hydroxybutyl)-*omega*-hydroxypoly(oxytetramethylene) and 4,4'-methylenedi(cyclohexyl) di-isocyanate or methyl-*m*-phenylene di-isocyanate	9
ex 39.01 CVII Polyimide sheet and strip, whether or not in rolls	0
ex 39.01 CVII *alpha*-4-hydroxybutly-*omega*-hydroxypoly(oxytetramethylene)	0
ex 39.01 CVII Polyethylene oxide having a molecular weight of not less than 4 000 000	8
ex 39.02 CIb) Polyethylene film, of a width not less than 4.5 and not more than 5.5 cm and having a molecular weight of not less than 4 000 000, in rolls, intended for use as conveyor belts in machines for manufacturing cigars	0
ex 39.02 CII Microporous polytetrafluroethylene film, not less than 30 cm in width and weighing not more than 22.4 g/m², whether or not in rolls	0
ex 39.02 CIII Polysulphohaloethylenes in one of the forms mentioned in Note 3(a) and (b) to Chapter 39	4
ex 39.02 CVIa) and b) Copolymers solely of allyl alcohol with styrene, which have an acetyl value of not less than 175	0
ex 39.02 CVIIb) Polyvinyl chloride sheeting, whether nor not in rolls, of a thickness less than 1 mm and coated with an adhesive in which are embedded hollow glass balls having a diameter of not less than 50 micrometres and not more than 100 micrometres	0
ex 39.02 CVIII Copolymers of vinylidene chloride with vinyl chloride, containing not less than 78% by weight of vinylidene chloride, in one of the forms mentioned in Note 3(a) and (b) to Chapter 39, for the manufacture of fibres, monofil or strip	0
ex 39.02 CXI Polyvinyl butyral sheet of a width exceeding 200 cm, in rolls	0
ex 39.02 CXII Polyacrylic acid for use as a thickener in textile pigment printing pastes	0
ex 39.02 CXII Reflecting polyacrylic sheeting, whether or not in rolls	0
ex 39.02 CXII Copolymerisation products of acrylic and methacrylic esters in the form of film of a thickness not less than 50 and not more than 150 micrometers, whether or not in rolls	0
ex 39.02 CXII Poly(2-diethylaminoethyl methacrylate) dissovled in *N,N*-dimethylacetamide, with a polymer content of less than 55% by weight	0
ex 39.02 CXII Copolymer of 2-di-isopropylaminoethyl methacrylate and decyl methacrylate dissolved in *N,N*-dimethylacetamide, with a copolymer content of not less than 55% by weight	0
ex 39.02 CXII Copolymer of acrylic acid and 2-ethylhexyl acrylate containing not less than 10% and not more than 11% by weight of 2-ethylhexyl acrylate	0
ex 39.02 CXIVa) Poly(1-ethylethylene) in one of the forms mentioned in Note 3(b) to Chapter 39	0
ex 39.02 CXIVa) Copolymers of ethyl acrylate with chloroethylvinyl ether, in one of the forms mentioned in Note 3(b) to Chapter 39	12
ex 39.02 CXIVa) Alternating copolymers of ethylene and maleic anhydride for use as a thickener in textile pigment printing pastes	0
ex 39.02 CXIVa) Copolymers of vinylidene chloride and acrylonitrile in the form of expandable beads of a diameter not less than 4 micrometres and not more than 20 micrometres	0
ex 39.02 CXIVa) Copolymers of vinyl chloride with vinyl acetate and vinyl alcohol containing by weight not less than 89% and not more than 92% of vinyl chloride, not less than 2% and not more than 6% of vinyl acetate and not less than 4% and not more than 8% of vinyl alcohol, in one of the forms mentioned in Note 3(a) and (b) to Chapter 39	0
ex 39.02 CXIVa) Fluorinated ethylene propylene copolymers, intended for the manufacture of flat (ribbon) cable, containing not less than 60 cores	0
ex 39.02 CXIVb) Polyvinyl fluoride sheet, whether or not in rolls	0
39.03 BVa)1 Ethylcellulose, not plasticised	4
ex 39.03 BVa)2 Ethylhydroxyethylcellulose, insoluble in water	4
ex 39.03 BVa)2 Hydroxypropylcellulose	0
ex 39.06 B *O*-(2-hydroxyethyl)amylopectin hydrolysate	0
ex 41.02 B Bovine skins, chrome tanned in the moist state (wet blue)	0
ex 41.02 B Leather of East India kip, whole, whether or not the heads and legs have been removed, each weighing more than 4.5 kg net and not more than 8 kg, not further prepared than vegetable tanned, whether or not having undergone further preservative treatment with oil, but obviously unsuitable for immediate use in the manufacture of leather articles	0
41.03 BI Sheep and lambskin leather, except leather falling within heading no. 41.06 or 41.08, other, not further prepared than tanned	0
41.04 BI Goat, and kid skin leather, except leather falling within heading no. 41.06 or 41.08, other, not further prepared than tanned	0
41.05 BI Other kinds of leather, except leather falling within heading no. 41.06 or 41.08, other, not further prepared than tanned	0
ex 44.22 B Used casks and barrels of oak, whether assembled or not; their staves and heads	0
ex 44.25 DII Shingles for roofs and walls, of coniferous wood	0
45.01 Natural cork, unworked, crushed, granulated or ground; waste cork	0
45.02 Natural cork in blocks, plates, sheets or strips (including cubes or square slabs, cut to size for corks or stoppers)	4
ex 49.11 B Microcopies on an opaque base intended for data banks and libraries	0
ex 49.11 B Artists' screen prints (commonly described as serigraphs), signed by the artist and numbered from 1 to 200	0
ex 49.11 B Sheets (not being trade advertising material) folded, merely with illustrations or pictures not bearing a text or caption for editions of books or periodicals which are published in different countries in one or more languages	0
ex 51.01 A Yarn wholly or polyglycollic acid	0
ex 51.01 A Yarn of polytetrafluoroethylene	0
ex 51.02 AII Polyimide strip, whether or not in rolls	0
ex 51.02 AII Strip of polytetrafluoroethylene, whether or not in rolls, with an extension at break not exceeding 25%	0
ex 51.04 A Woven fabrics of polyvinyl alcohol fibres for machine embroidery	0
ex 54.03 BIa) Unbleached linen yarn (excluding yarn of flax tow), measuring per kg 30 000 m or less, for the manufacture of multiple of cabled yarns for the footwear industry or for whipping cables	0
ex 56.01 A Synthetic textile fibres of aromatic polyamides obtained by polycondensation of *m*-phenylenediamine and isophthalic acid	0

*Seasonal suspension for the seven-month period ending 31 March each year.

Further details of goods effected by the CCT tariff review will be published in 'Trade and Industry' next week.

CCT heading No./Description	CCT suspended rate of duty %
ex 29.19 C 2,2-Bis(chloromethyl)trimethylene tetrakis(2-chloroethyl) di(phosphate)	0
ex 29.22 BII *N,N,N',N'*,-Tetrabutylhexamethylenediamine	0
ex 29.22 DI 3,5-Dichloroaniline	0
ex 29.22 EII 1,8-Naphthylendiamine	0
ex 29.22 EII *m*-Phenylenebis(methylamine)	0
ex 29.23 AII (+)-4-Dimethylamino-3-methyl-1,2-diphenyl-butan-2-ol	0
ex 29.23 AII Bis(2-dimethylaminoethyl) ether	0
ex 29.23 AII Dinoprost (INN), Trometamol salt (INN)	0
ex 29.23 BII 3-Chloro-4(4-chlorophenoxy)aniline	6
ex 29.23 C Ketamine (INN) hydrochloride	0
ex 29.23 DV *beta*-Alanine	0
ex 29.23 DV Tranexamic acid (INN)	0
ex 29.23 DV Sodium 2-cyclohexa-1,4-dienyl-*N*-(2-methoxycarbonyl-1-methylvinyl)glycinate	0
ex 29.23 DV 3,5-Diaminobenzoic acid	0
ex 29.23 E 4-(2-Hydroxy-3-isopropylaminopropoxy)-2,3,6-trimethylphenyl acetate	0
ex 29.23 E *N*-Benzyl-*N*-(3-hydroxybenzoylmethyl)methyl-ammonium chloride	0
ex 29.23 E Methyldopa (INN)	0
ex 29.23 E Diethyl 1,3-benzodioxol-5-ylaminomethyl-malonate	0
ex 29.23 E 6-Acetyl-1,3-benzodioxol-5-ylammonium chloride	0
ex 29.25 AII (3-Methacrylamidopropyl)trimethylammonium chloride	0
ex 29.25 AII *N*-Acetyl-*DL*-valine	0
29.25 BIIa) 5-Ethyl-5-phenylbarbituric acid (phenobarbital) and its salts	11
ex 29.25 BIIb) 2'Benzoyl-4'-chloro-*N*-(2-hydroxypropyl)-glycinanilide	0
ex 29.26 AI *O*-Benzoicsulphimide (saccharin) and its sodium salt	8
ex 29.27 4-Bromophenylacetonitrile	0
ex 29.27 (-)-*N*-(*alpha*-Cyano-4-hydroxy-3-methoxy-*alpha*-methylphenethyl)acetamide	0
ex 29.27 2-(3-Phenoxyphenyl)propiononitrile	0
ex 29.29 20-Hydroxyiminopregna-5,16-dien-3-yl acetate	0
ex 29.29 (-)-2(3,4-Dihydroxybenzyl)-2hydrazinopropionic acid	0
ex 29.29 1,3-Bis(4-ehlorobenzylideneamino)guanidinium chloride	0
ex 29.29 *N,N*-Diethylhydroxylamine	0
ex 29.30 *O,O*-Bis(4-*tert*-butylphenyl) *N*-cyclohexylphosphoramidothiate	0
ex 29.31 B Cyclohexanethiol	0
ex 29.31 B 5-Fluoro-2-methyl-1-(4-methylthiobenzylidene)-inden-3-ylacetic acid	0
ex 29.31 B *N,N*-Diethyl-2-mercaptoethylammonium chloride	0
ex 29.31 B Octadecyl (4-hydroxy-3,5-dimethylbenzylthio)-acetate	0
ex 29.31 B 2-Methyl-2-(methylthio)propionaldehyde oxime	0
ex 29.31 B 4-(Methylthio)phenol	0
ex 29.31 B Thiophenol	0
ex 29.31 B Tolnaftate (INN)	0
ex 29.34 C *O*-Ethyl phenylphosphonochloridothioate	0
ex 29.34 C Dimethyltin dichloride	0
ex 29.34 C Trichloronat (ISO)	0
ex 29.35 Q 2-Acetyl-1,4-butyrolactone	0
ex 29.35 Q Amprolium (INN) hydrochloride	0
ex 29.35 Q Methyl-3-amino-5,6-dichloropyrazine-2-carboxylate	0
ex 29.35 Q 2-Chloro-10*H*-dibenz[*b,f*][1,4]oxazepin-11-one	0
ex 29.35 Q 6-Methoxybenzothiazol-2-ylamine	0
ex 29.35 Q 4-Nitrobenzyl 7-amino-3-methyl-8-oxo-5-thia-1-azabicyclo[4.2.0]oct-2-ene-2-carboxylate and its salts	0
ex 29.35 Q 2-Benzotriazol-2-yl-4-(1,1,3,3-tetramethylbutyl)-phenol	0
ex 29.35 Q 2-Benzotriazol-2-yl-*p*-cresol	0
ex 29.35 Q 2,6-Di-*tert*-butyl-4-[4,6-bis(octylthio)-1,3,5-triazin-2-ylamino] phenol	0
ex 29.35 Q and ex 30.03 AIIb) Butorphanol (INN) and its salts	0
ex 29.35 Q (-)-1-*tert*-Butylamino-3-(4-morpholino-1,2,5-thiadiazol-3-yloxy)propan-2-ol	0
ex 29.35 Q Clotiazepam (INN)	0
ex 29.35 Q 1,4-Diazabicyclo [2.2.2] octane (triethylenediamine	0
ex 29.35 Q 2,4-Di-*tert*-butyl-6-(5-chlorobenzotriazol-2-yl) phenol	0
ex 29.35 Q Carpipramine (INN) dihydrochloride	0
ex 29.35 Q 2,3-Dihydro-2,2-dimethylbenzofuran-7-ol	0
ex 29.35 Q 1-Ethyl-1,4-dihydro-4-oxo[1,3]dioxolo[4,5-g] cinnoline-3-carbonitrile	0
ex 29.35 Q Indometacin (INN)	0
ex 29.35 Q Diphemanil metilsulphate (INN)	0
ex 29.35 Q Minoxidil (INN)	0
ex 29.35 Q Orazamide (INN)	0
ex 29.35 Q (25*R*)-Spirost-5-en-3-*beta*-ol (diosgenin) and its esters	0
ex 29.35 Q 1,3,5-Triacryloylperhydro-1,3,5-triazine	0
ex 29.35 Q Triazolam (INN)	0
ex 29.35 Q *L*-Tryptophan	0
ex 29.36 Quinethazone (INN)	0
ex 29.36 Sulfaguanidine (INN)	0
ex 29.36 Sulfathiazole (INN)	0
ex 29.38 BII Panthenol (INN)	0
ex 29.38 BIII Folic acid (INN)	0
ex 29.39 CI Serum gonadotrophin (INN)	0
ex 29.39 DII Betamethasone (INN) 21-acetate	0
ex 29.39 DII Triamcinolone (INN) acetonide	8
ex 29.39 DII Betamethasone (INN) 17,21-dipropionate	0
ex 29.39 DII Triamcinolone (INN) 16-*alpha*,21-diacetate	8
ex 29.39 DII Fluorometholone (INN)	0
ex 29.39 DII Halcinonide (INN)	0
ex 29.39 DII Triamcinolone hexacetonide (INN)	8
ex 29.39 DII Methylprednisolone (INN)	8
ex 29.39 DII Triamcinolone (INN)	8
ex 29.39 E Calcitonin (INN), porcine	0
ex 29.39 E Calcitonin (INN), salmon-type, and its salts	0
ex 29.39 E Calusterone (INN)	0
ex 29.39 E Prasterone (INN)	0
ex 29.42 CVII Pilocarpine hydrochloride	0
ex 29.42 CVII Pilocarpine nitrate	0
ex 29.42 CVII (22*R*,25*R*)-Tomat-5-enin-3-*beta*-ol (Solasodine)	0
ex 29.44 A Epicillin (INN)	0
ex 29.44 C and ex 30.03 AIIb) Amikacin (INN) and its salts	0
ex 29.44 C Amphotericin B (INN)	0
ex 29.44 C Sodium (7*S*)-3-carbamoyloxymethyl-7-methoxy-8-oxo-7-[2-(2-thienyl)acetamido]-5-thia-1-azabicyclo [4.2.0] oct-2-ene-2-carboxylate	0
ex 29.44 C Cefaclor (INN) and its hydrates, salts and esters	0
ex 29.44 C Cefradine (INN)	0
ex 29.44 C Cefazolin (INN) and its salts	0
ex 29.44 C Minocycline (INN) *mono*-hydrochloride dihydrate	0
ex 29.44 C Clindamycin (INN) and its salts and esters	0
ex 29.44 C Lincomycin (INN) and its salts and esters, intended for the manufacture of products falling in heading 30.03	0
ex 29.44 C Spectinomycin (INN) dihydrochloride pentahydrate	0
ex 29.44 C Gentamicin (INN) and its salts	0
ex 29.44 C Monensin (INN) and its salts	0
ex 29.44 C Nystatin (INN)	0
ex 29.44 C and ex 30.03 AIIb) Bleomycin (INN) sulphate	0
ex 29.44 C Sisomicin (INN) sulphate	0
ex 29.44 C Spectinomycin (INN) sulphate	0
ex 29.44 C Tobramycin (INN) and its salts	0
ex 29.45 Potassium *tert*-butoxide	0
ex 30.01 AI Bovine livers for organotherapeutic purposes, dried and powdered	5
ex 30.01 B Mixture of oestrogens of equine origin	0
ex 30.01 B Human glands or other human organs	0
ex 30.01 B Extracts of liver of bovine animals	5
ex 30.01 B Extracts of suprarenal glands	0
ex 30.01 B Lyophilised *gamma*-globulin derived from human blood	0
ex 30.01 B The following substances derived from human blood: antihaemophilic globulin, anti-Rh_o(D)-globulin and plasmaprotein solution	0
ex 30.01 B Anti-D immunoplasma	0
ex 30.01 B Albumin in crude paste form derived from human blood	0
ex 30.01 B *gamma*-Globulin, in solution, derived from human blood	0
ex 30.01 B *gamma*-globulin, crude paste	0
ex 30.01 B Human plasma	0
ex 30.01 B Human serum	0
ex 30.01 B, ex 30.03 AIIb) and 30.03 BIIb) Human albumin, whether or not in solution	0
ex 30.01 B, ex 30.03 AIIb) and ex 30.03 BIIb) Human fibrinogen	0
ex 30.02 A Tetanus immunoglobulin	0
ex 30.02 A Anti-tetanus immunoplasma	0
ex 30.03 AIIb) and ex 30.03 BIIb) Preserved serum prepared on a basis of human blood	0
ex 30.03 AIIb) and ex 30.03 BIIb) Anti-haemophilic globulin and anti-Rh_o(D) globulin derived from human blood	0
ex 30.03 BIIb) *gamma*-globulin, in solution, derived from human blood	0
ex 30.03 BIIb) Lyophilised *gamma*-globulin derived from human blood	0
32.01 AI Tanning extracts of wattle (mimosa)	0
ex 32.01 AIV Tanning extracts of eucalyptus	4
ex 32.01 AIV Tanning extracts derived from gambier and myrobolan fruits	0
ex 32.06 D Glass in the form of flakes of a length not less than 0.1 and not more than 3.5 mm and of a thickness not less than two and not more than five micrometers	0
ex 34.02 (Alkyl, C_{12}-C_{14}) benzylbis (2-hydroxypropyl) ammonium chloride	0

CCT heading No./Description	CCT suspended rate of duty %
ex 35.07 Bromelains (INN)	0
ex 35.07 Mixture of streptokinase (INN) and streptodornase (INN)	0
ex 35.07 Peroxidase	0
ex 37.02 B Colour negative film of a width not less than 75 mm and not more than 105 mm and of a length of 100 m or more, suitable for use in the manufacture of 'instant picture' film packs	0
ex 38.03 B Acid activated montmorillonite which, when examined by X-ray powder diffraction, shows four principal lines corresponding to crystal interplanar spacing (d values) of 0.44, 0.40, 0.33 and 0.25 nm, the line corresponding to 0.40 nm being the most intense	0
38.07 A Gum spirits of turpentine	3
38.07 B Spirits of sulphate turpentine; crude dipentene	3
38.07 C Spirits of wood turpentine; terpenic solvents produced by the distillation or other treatment of coniferous woods; sulphite turpentine; pine oil (excluding 'pine oils' not rich in terpineol)	3
ex 38.08 C Hydroabietyl alcohol	0
ex 38.08 C Rosin, hydrogenated, polymerised, dimerised or oxidised	4
ex 38.19 G Catalysts consisting of copper chloride supported on aluminium oxide for the preparation of dichloroethane from ethylene, hydrochloric acid and oxygen	0
ex 38.19 G Catalysts consisting of bis(2-dimethylaminoethyl) ether dissolved in 1,1'-oxydipropan-2-ol	0
ex 38.19 G Catalysts consisting essentially of diphosphorus pentaoxide on an inert support	0
ex 38.19 G Catalysts, in the form of granules or rings having a diameter of not less than 3 mm and not more than 10 mm, consisting of silver supported on aluminium oxide, the silver content being not less than 10% and not more than 20% by weight	0
ex 38.19 K Sintered magnesite mixed with small quantities of mineral oils	0
ex 38.19 U Flame-retardant reaction products of acetaldehyde, ethylene oxide and phosphorus trichloride	0
ex 38.19 U Intermediate products from the manufacture of monensin salts	0
ex 38.19 U Grains consisting of a mixture of dialuminium trioxide and zirconium dioxide containing by weight not less than 70% and not more than 78% dialuminium trioxide and not less than 19% and not more than 26% of zirconium dioxide	7.6
ex 38.19 U Grains consisting of a mixture of dialuminium trioxide and zirconium dioxide containing by weight not less than 54% and not more than 62% dialuminium trioxide and not less than 36% and not more than 44% zirconium dioxide	7.6
ex 38.19 U *N*-(2-methyl-2-nitropropyl)-4-nitrosoaniline containing not less than 65% by weight of an inert filler	0
ex 38.19 U Calcined bauxite (refractory grade)	0
ex 38.19 U Diosgenin crude	0
ex 38.19 U 4-(6-Fluoro-2-methylinden-3-ylmethyl)phenyl methyl sulphide, dissolved in toluene	0
ex 38.19 U Tetramethylammonium hydroxide dissolved in methanol	0
ex 38.19 U Mixture of x-butyl-4,4'-isopropylidenediphenol and x,x'-dibutyl-4,4'-isopropylidenediphenol	0
ex 38.19 U Mixture of nitromethane and 1,2-epoxybutane	4
ex 38.19 U Mixture of 4-octyldiphenylamine and 4,4'-dioctyldiphenylamine	0
ex 38.19 U Reaction products containing not less than 55% by weight of 2-(2-*p*-chlorophenylbenzoxazol-5-yl) propiononitrile	0
ex 38.19 U Mixture of tertiary thiols	9
ex 39.01 Colestipol (INN) hydrochloride	0
ex 39.01 CIII, ex 39.03 BIIb)2, BIIIb)4aa) and BIVb)4aa) Waste and scrap of photographic (including cinematographic) and X-ray film	0
ex 39.01 CIII Reflecting polyester sheeting, whether or not in rolls	0
ex 39.01 CIII Waste and scrap of polyester sheets coated with tungsten compounds	0
ex 39.01 CIII Film base, in rolls, of polyethylene terephthalate, for cinematography or photography (including radiography)	8
ex 39.01 CV Polyurethane pre-polymers, in the forms mentioned in Note 3(a) to Chapter 39 containing not less than 3.9 and not more than 4.3 per cent of isocyanate by weight and having a viscosity at 100° C of not less than 500 and not more than 600 centipoises based on *alpha*-(4-hydroxybutyl)-*omega*-hydroxypoly(oxytetramethylene) and 4,4'-methylenedi(cyclohexyl) di-isocyanate or methyl-*m*-phenylene di-isocyanate	9
ex 39.01 CVII Polyimide sheet and strip, whether or not in rolls	0
ex 39.01 CVII *alpha*-4-hydroxybutly-*omega*-hydroxypoly(oxytetramethylene)	0
ex 39.01 CVII Polyethylene oxide having a molecular weight of not less than 4 000 000	8
ex 39.02 CIb) Polyethylene film, of a width not less than 4.5 and not more than 5.5 cm and having a molecular weight of not less than 4 000 000, in rolls, intended for use as conveyor belts in machines for manufacturing cigars	0
ex 39.02 CII Microporous polytetrafluroethylene film, not less than 30 cm in width and weighing not more than 22.4 g/m², whether or not in rolls	0
ex 39.02 CIII Polysulphohaloethylenes in one of the forms mentioned in Note 3(a) and (b) to Chapter 39	4
ex 39.02 CVIa) and b) Copolymers solely of allyl alcohol with styrene, which have an acetyl value of not less than 175	0
ex 39.02 CVIIb) Polyvinyl chloride sheeting, whether nor not in rolls, of a thickness less than 1 mm and coated with an adhesive in which are embedded hollow glass balls having a diameter of not less than 50 micrometres and not more than 100 micrometres	0
ex 39.02 CVIII Copolymers of vinylidene chloride with vinyl chloride, containing not less than 78% by weight of vinylidene chloride, in one of the forms mentioned in Note 3(a) and (b) to Chapter 39, for the manufacture of fibres, monofil or strip	0
ex 39.02 CXI Polyvinyl butyral sheet of a width exceeding 200 cm, in rolls	0
ex 39.02 CXII Polyacrylic acid for use as a thickener in textile pigment printing pastes	0
ex 39.02 CXII Reflecting polyacrylic sheeting, whether or not in rolls	0
ex 39.02 CXII Copolymerisation products of acrylic and methacrylic esters in the form of film of a thickness not less than 50 and not more than 150 micrometers, whether or not in rolls	0
ex 39.02 CXII Poly(2-diethylaminoethyl methacrylate) dissovled in *N,N*-dimethylacetamide, with a polymer content of less than 55% by weight	0
ex 39.02 CXII Copolymer of 2-di-isopropylaminoethyl methacrylate and decyl methacrylate dissolved in *N,N*-dimethylacetamide, with a copolymer content of not less than 55% by weight	0
ex 39.02 CXII Copolymer of acrylic acid and 2-ethylhexyl acrylate containing not less than 10% and not more than 11% by weight of 2-ethylhexyl acrylate	0
ex 39.02 CXIVa) Poly(1-ethylethylene) in one of the forms mentioned in Note 3(b) to Chapter 39	0
ex 39.02 CXIVa) Copolymers of ethyl acrylate with chloroethylvinyl ether, in one of the forms mentioned in Note 3(b) to Chapter 39	12
ex 39.02 CXIVa) Alternating copolymers of ethylene and maleic anhydride for use as a thickener in textile pigment printing pastes	0
ex 39.02 CXIVa) Copolymers of vinylidene chloride and acrylonitrile in the form of expandable beads of a diameter not less than 4 micrometres and not more than 20 micrometres	0
ex 39.02 CXIVa) Copolymers of vinyl chloride with vinyl acetate and vinyl alcohol containing by weight not less than 89% and not more than 92% of vinyl chloride, not less than 2% and not more than 6% of vinyl acetate and not less than 4% and not more than 8% of vinyl alcohol, in one of the forms mentioned in Note 3(a) and (b) to Chapter 39	0
ex 39.02 CXIVa) Fluorinated ethylene propylene copolymers, intended for the manufacture of flat (ribbon) cable, containing not less than 60 cores	0
ex 39.02 CXIVb) Polyvinyl fluoride sheet, whether or not in rolls	0
39.03 BVa)1 Ethylcellulose, not plasticised	4
ex 39.03 BVa)2 Ethylhydroxyethylcellulose, insoluble in water	4
ex 39.03 BVa)2 Hydroxypropylcellulose	0
ex 39.06 B *O*-(2-hydroxyethyl)amylopectin hydrolysate	0
ex 41.02 B Bovine skins, chrome tanned in the moist state (wet blue)	0
ex 41.02 B Leather of East India kip, whole, whether or not the heads and legs have been removed, each weighing more than 4.5 kg net and not more than 8 kg, not further prepared than vegetable tanned, whether or not having undergone further preservative treatment with oil, but obviously unsuitable for immediate use in the manufacture of leather articles	0
41.03 BI Sheep and lambskin leather, except leather falling within heading no. 41.06 or 41.08, other, not further prepared than tanned	0
41.04 BI Goat, and kid skin leather, except leather falling within heading no. 41.06 or 41.08, other, not further prepared than tanned	0
41.05 BI Other kinds of leather, except leather falling within heading no. 41.06 or 41.08, other, not further prepared than tanned	0
ex 44.22 B Used casks and barrels of oak, whether assembled or not; their staves and heads	0
ex 44.26 DII Shingles for roofs and walls, of coniferous wood	0
45.01 Natural cork, unworked, crushed, granulated or ground; waste cork	0
45.02 Natural cork in blocks, plates, sheets or strips (including cubes or square slabs, cut to size for corks or stoppers)	4
ex 49.11 B Microcopies on an opaque base intended for data banks and libraries	0
ex 49.11 B Artists' screen prints (commonly described as serigraphs), signed by the artist and numbered from 1 to 200	0
ex 49.11 B Sheets (not being trade advertising material) folded, merely with illustrations or pictures not bearing a text or caption for editions of books or periodicals which are published in different countries in one or more languages	0
ex 51.01 A Yarn wholly or polyglycollic acid	0
ex 51.01 A Yarn of polytetrafluoroethylene	0
ex 51.02 AII Polyimide strip, whether or not in rolls	0
ex 51.02 AII Strip of polytetrafluoroethylene, whether or not in rolls, with an extension at break not exceeding 25%	0
ex 51.04 A Woven fabrics of polyvinyl alcohol fibres for machine embroidery	0
ex 54.03 BIa) Unbleached linen yarn (excluding yarn of flax tow), measuring per kg 30 000 m or less, for the manufacture of multiple of cabled yarns for the footwear industry or for whipping cables	0
ex 56.01 A Synthetic textile fibres of aromatic polyamides obtained by polycondensation of *m*-phenylenediamine and isophthalic acid	0

*Seasonal suspension for the seven-month period ending 31 March each year.

Further details of goods effected by the CCT tariff review will be published in 'Trade and Industry' next week.

Overseas trade news

Exporters should go for quality – Catherwood tells conference

The exporter who sells on price is going to find the going tougher, and the one who sells on quality is on to a winner. Sir Frederick Catherwood, chairman of the board, made this point to delegates at a British Overseas Trade Board Export United conference – 'Earning more from exports' – at the London International Press Centre on 28 November.

Sir Frederick said that the market in western Europe and north America, already taking the majority of the UK's trade, would grow faster than the rest of the world and would become more and more discriminating. 'They will know exactly what they want, and they will be prepared to pay for it.'

He went on to say that at the same time price competition at the lower end of most markets was going to get worse. North Sea oil, and, hopefully, some success in Britain's struggle against inflation, would keep the pound rather stronger than it had been in the past and competition from newly developing industrial countries was going to get harder.

The same theme was picked up by Bernard Scott, chairman of Lucas Industries and a former board member, in his lunchtime speech. It was in the production area that there was so much to be lost or gained he said. 'All of us need to work for improved productivity with far fewer interruptions, but as well we need to pay attention to quality motivation and quality consciousness at all levels.' He said British representatives travelling overseas had to stop selling Britain short. However good a job a British exporter did in promoting his own product or interest he had to realise that he could undo a lot of that good if he followed it up with an off-the-record analysis of the 'doom and gloom' about Britain.

The conference, attended by over 200 senior businessmen and shopfloor representatives, looked at the importance of non-price factors in profitable exporting. The export experiences of four leading British companies – Kenwood, Van Heusen, Lucas and Beecham – were used to highlight the particular areas of marketing methods, design for particular markets and shopfloor involvement.

Kenwood, part of Thorn Domestic Appliances International, showed how good design, coupled with careful marketing had established the company as 'the Rolls-Royce of kitchen mixers' – although Jack Warner, executive director of Thorn International, prefers to think of Rolls-Royce as the Kenwood of motor cars.

From its founding in the late 1940s the company had always been very export-orientated and currently exports accounted for between 50 and 60 per cent of total production. The company followed the philosophy of its founder, Kenneth Wood, in that if the design was right and the market wanted it, the rest fitted in.

Kenwood now makes over 150 variants of the 'Chef' mixer at its Havant factory and a wide range of Kenwood accessories is available. It is the flexibility offered by these accessories and the almost legendary reliability of the basic machine which keeps Kenwood's export order book pleasantly full. Jack Warner emphasised, when asked about Kenwood's future that it was easy to build on success, particularly if the company had a quality product.

Quality and attention to detail were major factors in the success story of the second case study company – British Van Heusen. The company described how top-quality garments commanded a premium price in the face of fierce competition, with quality improved by involving the shopfloor. Though some manufacturing operations were mechanised it was still true to say that Van Heusen shirts were virtually hand-made.

Last year the company exported over £3 million worth of shirts – an 18 per cent increase in volume over the previous year's sales. John Campbell, the company's sales director, attributed much of this success to the effort of the shopfloor and increased communication within the factory. He said that the aims of Export Year were explained to staff; wall maps, showing the extent of the company's involvement worldwide, were put in the factory; regular export bulletins giving details of sales targets were issued; and overseas visitors were introduced to production staff so helping to break down barriers and involve everyone in the company's export effort. John Campbell's summary was that companies had to try to get everyone's heart into the business.

Harry Lucas's adage, 'The memory of quality remains long after price is forgotten', was illustrated by Lucas CAV's presentation on the success of its quality oil filters in overseas markets.

The CAV type 296 filter, along with its companions the type 796 and the type 44, shared a unique 'V'-form paper roll construction so offering twice the filtration area of most competitive types.

Competitors had produced relatively low-priced copies of the 296 to try to compete with CAV, which produces only three filters in relation to their competitors' vast ranges. This small range gave the firm a position as 'specialists' in filters, selling to both replacement and original equipment markets by quality and name rather than on price. A case of a quality product making its own market, Harry Lucas said.

Beecham Products International, the division in the Beecham group responsible for all Beecham consumer products in Africa, Australia, the Caribbean, India and the Middle and Far East, concentrated on showing how first-class marketing developed new sales opportunities.

The marketing techniques of three different products, each in different markets were examined: Macleans toothpaste in Nigeria; Ribena in Australia; and Silvikrin shampoo in the Middle East.

The launching of any individual Beecham product in an overseas market was based on an initial screening to discover whether the market matched an 'ideal territory' profile. This was then followed by a feasibility study and the need for full commitment to the market, taking the end consumer as the key point and applying a total marketing approach.

The quality of the product was a vital factor in sales promotions: for example, in the case of Silvikrin shampoo, distribution was through supermarkets and larger grocers rather than the souks (the local traditional markets), which tended to specialise in cheaper products.

Bernard Scott, chairman of Lucas Industries, speaking at the conference. Seated on his left are Sir Frederick Catherwood, BOTB chairman, and Colin Smale, a board member.

UK industry gains over £20m from aid grants and loans to developing countries

British industry received over £20 million in October from orders arising from aid grants and loans made to the developing countries by the Ministry of Overseas Development and administered by the Crown Agents.

The following were among the largest contracts for goods accepted for financing in October, including earlier contracts now accepted for reimbursement from aid funds:

Carding machines for Bangladesh (£291,229) from Crosol Ltd, Halifax, Yorkshire; tractor spares for Bangladesh (£109,593) from Massey Ferguson (UK) Ltd, Coventry; two water tenders for fire fighting for Bangladesh (£61,616) from Hestair Eagle Ltd, Warwick; switchgear for electricity distribution for Ecuador (£41,438) from GEC Switchgear, Manchester; mild steel beams and joists for India (£4,506,775) from British Steel, Middlesbrough; education furniture for Jamaica (£30,050) from Educational Supply Association Ltd, Stevenage, Hertfordshire; machine shop equipment for Mauritius (£20,216) from SKS (Plant and Equipment) Ltd, Smallfield, Surrey; bridges and ferry boats for Mozambique (£333,086) from Thomas Storey Ltd, London; a steel framed building for Mozambique (£45,600) from Painter Brothers Ltd, Hereford; microscopes for Tanania (£487,537) from Vickers Instruments Ltd, York; cane trailers for Zambia (£102,432) from Tate and Lyle Engineering, Bromley, Kent; textile machinery spares for Zambia (£88,923) from Platt Seco Lowell Ltd, Accrington, Lancs.

Low-value consignment limit raised to £200

Partly as a result of changes in EEC regulations Customs and Excise says that it has been possible to raise the value limits for simplified export documentation, using form C273(LV), from the present level of under £150 (fob) to under £200 (fob) subject to the present net weight limit of 1000 kg per item. Other conditions for using C273(LV) remain unaltered.

This change will take effect on 1 January 1979. Stocks of form C273(LV) overprinted 'under £100' may continue to be used provided that goods under each of the tariff/trade code numbers are within the monetary and weight limits.

It is expected that this reduction in the form filling burden, resulting from the use of simplified export forms, will affect about 15 000 export forms a month.

Low-value trade is recorded in the overseas trade statistics in aggregate (under SITC (Rev 2) heading 931.0) though not analysed by commodity or country. The coverage of this heading will be changed for January 1979 after the change in the threshold value.

It is estimated that, because of rising prices, the proportion of trade covered by this heading will be no greater than that covered when this system of recording low-trade was introduced some years ago (ie less than 0.5 per cent of exports and less than 0.25 per cent of imports).

Customs issues aid to warehouse documentation

Customs and Excise is issuing a series of supplements entitled 'Warehousing documentation' to ease the task of essential form-filling.

Each supplement will deal with a particular form or related group of forms. They will be numbered in notice 191 series and each are being produced on a folded card format enabling them to stand up on their own for easier reference when completing forms.

The first notice in the series has already been issued as 191 (GW81 supplement) and gives advice on the completion of a new form for inter-warehouse removals (wet goods and tobacco products) which came into force on 1 December.

Notice 191 (GW60 supplement) will be issued shortly for use with the new form GW60 (wet goods and tobacco products ex-bonded warehouse for exportation) to be introduced on 28 December.

Copies of the notices may be obtained from warehouse officers or local offices of Customs and Excise.

'Hints to exporters' series launched by BOTB

A new series of booklets *Hints to Exporters* designed to replace the 'Hints to businessmen' series was launched by the British Overseas Trade Board on 4 December with the publication of three titles covering Bolivia, the People's Republic of the Congo, and Algeria. *Hints to Exporters* will carry the same basic information for potential exporters, such as details of accommodation, travel, and advertising outlets, in a new, slim format designed for easier reading and swifter reference.

The booklets, based on material supplied by on-the-spot representatives of the Foreign Office overseas, provide authoritative information for doing business in overseas markets.

A charge of £1, plus postage and packing was introduced for each volume of the 'Hints' series in April this year.

Copies of the new *Hints to exporters* booklets and the existing *Hints to Businessmen* series are obtainable from Publications Sales Unit BOTB, Export House, 50 Ludgate Hill, London EC4M 7HU.

ECGD publishes 'trading results' for 1977-78

Over 10 per cent of the business insured by the Export Credits Guarantee Department in 1977-78 was transacted in foreign currency. This, says ECGD, is the 'first fruits' of its foreign currency financing scheme and the encouragement given to exporters to invoice in foreign currencies.

The point is made in 'Trading results', the annual report of the department published on 29 November. The report also mentions that claims paid rose from £63.1 million to £94.2 million, a rise of nearly 50 per cent on the previous trading year. Over £50 million of this figure arose from 'political' (eg exchange rate) risks and over £33 million from 'buyer' risks. The number of exporters insured with ECGD at 31 March rose to 11 700, an increase of nearly 1000 in the year which accounted for about 33 per cent of total UK visible exports, compared with 37 per cent last year (this figure has fluctuated between 32 and 38 per cent over the last 11 years), the report says.

The total amount insured by ECGD was £12,940 million, a rise of 10.3 per cent on the

Britain signs Imco seafarers' training convention

Britain has become one of the first countries to sign the 1978 international convention on standards of training, certification and watch-keeping for seafarers.

Stanley Clinton Davis, Parliamentary Under-Secretary of State at the Department of Trade, signed the convention on behalf of the UK government on 30 November, the first date for signature.

The convention was adopted in July 1978, following a three-week conference in London. It establishes mandatory minimum requirements for the certification of deck officers, engineer officers and radio officers, and makes provision for training to ensure their continued proficiency and up-dating of knowledge. There are separate and additional requirements for masters, officers and ratings on oil tankers, and for masters, officers and ratings of chemical and liquefied gas tankers.

After the signing. Stanley Clinton Davis with Imco secretary general.

Over 80 per cent of maritime accidents are caused by human error and Britain regards it of prime importance that the convention should come into force at the earliest possible date.

The signing took place at the headquarters of Imco (the Inter-governmental Maritime Consultative Organisation) at 101 Piccadilly, London.

The convention will be open for signature until 30 November 1979.

The convention will come into force 12 months after being accepted by 25 states owning between them 50 per cent of the world's gross tonnage of merchant shipping.

previous year's £11,728 million; 81.7 per cent (79.9 in 1976-77) of this business was for goods sold on short term (up to six months credit) valued at £10,567 million, 13 per cent up on last year's £9,358 million.

Copies of 'Trading results' are available from Publicity Branch, ECGD, Aldermanbury House, Aldermanbury, London, EC2P 2EL, tel. 01-606 6699 ext. 258.

Nigerian cement works loan backed by ECGD

The repayment and funding of a $22.5 million loan which Morgan Grenfell has made available to the West African Portland Cement Co of Nigeria is being guaranteed by the Export Credits Guarantee Department.

The loan will help finance a contract of over $26 million awarded by the West African Portland Cement to F. L. Smidth of Croydon for the supply of machinery and equipment for the extension of the Shagamu cement works in the Ogun state. The unit is due to be commissioned in September 1981.

The Blue Circle Group, shareholders in West African Portland Cement, has been appointed technical consultants for the extension.

Market intelligence on Australia set up

Abta, the Australian-British Trade Association, is convinced that British industry is missing out on many export opportunities from the exploitation of Australia's natural gas fields, uranium and its vast mineral resources.

It has therefore established a market intelligence service – a forewarning scheme for information on proposed major projects. The service will gather specialised details of projects throughout Australia from a number of sources including consultants highly qualified in the industrial and engineering fields.

Abta considers that the scheme will give British companies an advantage over foreign competition because a considerable amount of information on projects will be available at feasibility stage. In addition, British companies will, it is hoped, be in a better position to assess the value of the Australian market and to determine whether a major sales visit to Australia is justified. It should also help in determining capital expenditure in order to gain a market in Australia.

Further details are available from Colin F. Campbell, director (UK), Australian-British Trade Association, 6th floor, Dorland House, 18-20 Lower Regent Street, London SW1Y 4PW, tel. 01-930 2524.

South Korea to hold woodwork show

The second international woodworking machine show will be held from 1 to 5 September 1979 at the exhibition hall of the Korea Society for the Advancement of Machinery Industry (Kosami). It is being organised by the Korea Furniture Export Association.

Brochures and application forms are available and the deadline for the receipt of applications is June 1979.

Details can be obtained from Mr Sung Soon Kyung, administration section, Korea Furniture Export Association, 40–17, 3-KA, Hankang-Ro, Yongsan-ku, Women's Council fifth floor, Seoul 140 Korea.

Seminar on overseas construction markets

A one-day conference, 'Future overseas markets for construction and components', is being organised by the Association of Building Component Manufacturers at the Cavendish Conference Centre, London W1, on 18 January 1979.

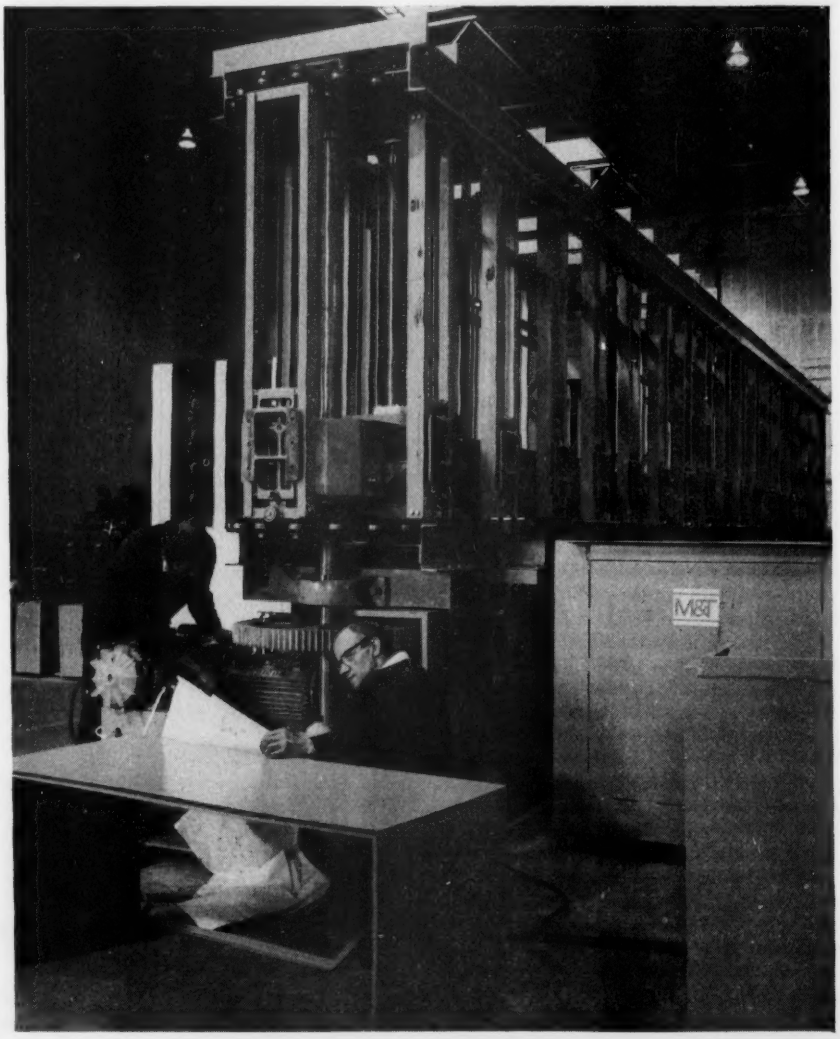
The conference is intended to tell delegates about the opportunities that exist for construction and component manufacturing companies in eastern Europe, South Korea and south America.

Mr R. Burges Watson, head, trade relations and export department at the Foreign Office, will open the conference and the main speakers will be A. Hope, executive secretary, East European Trade Council, S. Isherwood, director, Haden Young, K. G. Jessop, chairman, Stelmo, Dr. H. Blakemore, secretary, Institute of Latin American Studies, E. A. Cruddas, director, Mott, Hay and Anderson, N. S. Lister, manager, project finance department, Lloyds Bank International.

Further details can be obtained from the administrators of the conference: the Conference Secretary, Building Advisory Service, 18 Mansfield Street, London W1M 9FG, tel. 01-636 2862.

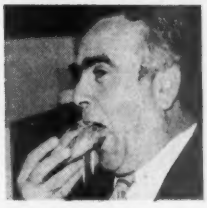
Plating line for Polish automotive bearings plant

'Long-return' plant for plating automotive bearings built by M & T Chemicals Ltd, Birmingham for GKN Contractors Ltd, Redditch, to Vandervell specification. The plating line will be incorporated by GKN Contractors in an extension at the Bimet bearings factory in Poland. John Zsoldas, fitter, and Jess Brewer, assembly chargehand, are shown during the construction of the plant at M & T's engineering works.



Overseas trade exhibitions

UK food goes down well at Paris show



From Helen Taylor, British embassy, Paris

Seventy-three British companies – the highest number ever – took part in the joint venture at the Paris food show (Sial), one of the highlights of France's exhibition calendar, held this year from 13 to 18 November.

Once again, Britain had the largest foreign stand at the show. The British pavilion caught the eye of the visitor to the international hall, as its location was indicated by a series of giant balloons, decorated with the Union Jack, suspended above the stands.

A wide variety of products was on display, including luxury goods that have recently caught on well in the French market, such as tea (successfully promoted at the show by Jackson's of Piccadilly, among others) and smoked salmon (from Pinney's Ltd, a newcomer to this sector) found interest from a number of large French retail organisations as well as a range of gourmet foods such as those presented by Fortnum and Mason (which obtained over 40 new accounts).

This year, a number of companies presented products new to the market, notably those representing a range of high quality preserves and pickles (newcomers included Rowats Foods Ltd, Jenks Brothers, Nelsons of Aintree Ltd, Newtime Foods Ltd and Wiltshire Foods Abroad) as well as biscuits and other packaged foods (British Overseas and Export Trading Ltd as among the first time exhibitors) and confectionery (Bassett's being among those present for the first time). The Stilton Cheese Manufacturers Association, representing seven manufacturers, was also introducing its traditionally English delicacy.

Eleven Northern Irish companies, coordinated by the Northern Ireland Agricultural Trust, occupied a prominent section of the British pavilion, where they presented an impressive array of Northern Ireland's produce.

The Milk Marketing Board for Northern Ireland, with a special promotion of dried milk, generated a great deal of interest. The Pig Marketing Board also obtained serious inquiries from international customers, although in dealing with the French it and other meat dealers were up against the mcas. Unipork, which is supplying pig meat products to the recently opened extension of Marks and Spencer in Paris, was also pleased with the interest shown from foreign visitors. Inglis Biscuits had a good show, as did Peile Foods and Jess Pet Foods. Another attraction was the Old Bushmills Whiskey stand. The Minister of State for Northern Ireland, Don Concannon, paid a visit to the pavilion on 14 November.

Among the British exhibitors in general, the consensus of opinion was that this had been a most successful show, particularly in terms of foreign visitors who had contacted them. Companies seeking agents and distributors were well satisfied with the number of people who expressed serious interest in taking on these functions.

One company that did exceptionally well was Young's Seafood, exhibiting with other companies in the Imperial Foods Group. It reckoned that over half its customers were French and at the end of the exhibition they claimed to have taken £380,000 worth of orders.

As a result of this year's show, a number of enterprises, including the Meat Promotions Executive and the Milk Marketing Board, have decided to embark on a series of promotions in retail outlets in France; their experience to date has convinced them that this extra effort should be able to substantially increase their share of the market.

French Prime Minister, Raymond Barre (left), touring the British pavilion at Sial accompanied by British ambassador, Sir Nicholas Henderson.

British firms impress at Toronto international interior design show

From John Hill, British consulate-general, Toronto

At the twelfth annual international interior design show held from 14 to 16 November in Toronto, 25 British companies took part under the joint sponsorship of the British Carpet Manufacturers Association and the British Contract Furnishing Association in collaboration with the British Overseas Trade Board.

The show, which attracted over 250 exhibitors from Canada, the United States and Europe, was officially opened by Verena Huber, president of the International Federation of Interior Designers, Amsterdam, Holland.

Carpets specially styled and coloured in contemporary and traditional designs for the north American market were shown by 16 companies who collectively account for a substantial portion of the British carpet exports to Canada which amounted to over $11 million in 1977.

Nine companies exhibited furniture and accessories for hotels, restaurants and institutions, architectural and decorative lighting, fine wall coverings in a variety of textures and decorative anodised aluminium.

Newcomers this year included William L. Maclean featuring English and French period carved furniture for hotel suites and Anima Graphics displaying an exciting selection of limited edition prints by British artists. Both companies reported interest and inquiries well above expectations. In 1977 British furniture exports to Canada were valued at 3.6 million dollars, of which about half was unupholstered wooden furniture.

British products were not confined to the joint venture stands: there were other impressive displays which included reproduction furniture, carpets, wall coverings, accessories and fine fabrics. Two new products which attracted special attention were a model kitchen unit and an armchair specially designed for arthritics.

Although some exhibitors expressed disappointment at what they thought was a decrease in the number of senior architects and designers visiting the show this year, most members of the British group reported that they had made sales or expected substantial business to develop as a direct result of their participation.

After a comparatively quiet year, there are distinct signs of a pick-up in the tempo of business activity in Canada. A recent forecast, based on reported intentions by leading manufacturing industries, projected an increase in capital expenditure in 1979 of 3 to 5 per cent in real terms compared with about 2 per cent in 1978 and 1.5 per cent in 1977. At the same time, consumer buying is expected to increase in real terms by about 4 per cent. With a population of 23.4 million and a per household income of over 20,000 dollars per year, Canada continues to be a worthwhile market for a wide range of British quality products.

Increasingly in the swim at Interbad

From G. R. M. Rogers, British consulate-general, Düsseldorf

This year's Interbad – the sixth – was by far the largest. Since it started in Düsseldorf in 1966 the fair has grown continually in size and international importance. It is now firmly established on the continent as a leading exhibition for swimming pools and accessories, medical baths, saunas and ancilliary equipment.

At this show held from 8 to 12 November in Düsseldorf there were 250 German exhibitors and 31 firms from abroad, from Britain (nine), Austria (three), Sweden (three), Switzerland (three), France (four), United States (two), Finland (two), Belgium (one), Denmark (one), Italy (one), Spain (one), and Canada (one).

Some 24 000 visitors from practically all European countries but also from the Middle East and the United States were counted and undoubtedly the Hogatec exhibition, held at the same exhibition centre from 11 to 15 November, helped to boost the number of trade visitors. Hogatec is an international exhibition devoted to the hotel and catering trade.

Britain was represented by a joint venture of nine firms under the sponsorship of the Birmingham Engineering and Building Centre which had its own information stand. The organisation of the joint venture was carried out by the British Overseas Trade Board in conjunction with the British consulate-general at Düsseldorf.

The stands were well laid out and attracted much favourable comment.

Several of the firms were looking for agents or distributors and reported having received encouraging inquiries which are expected to lead to franchises and satisfactory follow-up business.

It was generally felt that Britain had much to offer in terms of competitive prices, designs and quality. This was also confirmed by the promising trade reaction which, it is hoped, will bring in good business for Britain. All the firms said that they would come out to Germany again, possibly to Stuttgart in 1980, although the dates and venue have not been fixed as yet.

UK inventiveness on show in Paris salon

From Helen Taylor, British embassy, Paris

Britain's reputation for inventiveness was amply demonstrated at the Salon International de l'Emballage du Conditionement et de la Présentation – the packaging exhibition held this year in Paris from 13 to 18 November. This is a biennial event, timed to coincide with the international food exhibition, Sial (see page 515), since a large proportion of the products on show serve the food industry.

Firms in the British joint venture included major organisations as well as smaller specialist companies. Perhaps the most well known of the former was Metal Box, which exhibited not only the containers for which it is world famous but also machinery for seaming and filling containers at a rate of up to 600 cans per minute and a machine for reducing metal containers to fragments, to resounding effect.

P. P. Payne, a firm that reckons it has outstripped its competitors in the French market, had on show for the first time its new rotary labelling and printing machinery, and strapping material made out of polyester, which has the particular advantage of being easier to handle than the traditional steel.

Whitehall Machinery ran continuous demonstrations of four products from its extensive range of labelling, cartonning and heat-sealing machinery; it received a number of serious inquiries and the firm was hopeful of seeing a firm order by the end of the show.

Lawtons of Liverpool exhibiting too for the first time at the salon with its coding, marking and printing equipment, anticipated sales of four of its new machines. The company was also successful in appointing an agent for France.

The Harland group of companies reported that this had been their best show ever for their labelling machines as all the right people had been present. For Thermopulse, too, this was an extremely active exhibition.

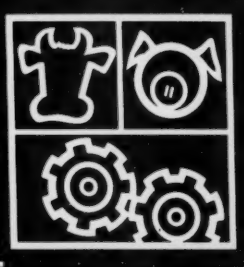
Amid all this impressive machinery, it was interesting to note that there was still room for the ingenious but inexpensive device designed to answer the consumer's need. The most arresting example, for an exhibition in France, was the plastic wine pack designed by Waddington and Duval Ltd, that reduces as the liquid is removed, so preserving it in a vacuum.

UK businessmen going overseas

British businessmen intending to travel overseas are urged in their own interests to make the earliest possible contact, before going abroad, with the Export Services and Promotions Division of the Department of Trade (at the appropriate regional office for firms outside London, and Export House, 50 Ludgate Hill, London EC4M 7HU for firms in London and the south east England). The department, in co-operation with commercial officers at embassies, high commissions and consulates overseas, is in a position to provide advice when it is required, and to help, where appropriate, in making trade contacts related to the purpose of the visit. Even where a businessman does not require specific assistance it is valuable for him to meet the commercial officers to get up-to-date information about the market. The Department of Trade would therefore welcome receiving notification of any businessmen intending to travel overseas.

agromek

International exhibition of agricultural mechanization equipment, cattle and pigs.



Advanced technical machinery and equipment and elite breeding animals - cattle and pigs - will welcome you in the 12 halls covering 45,000 sq.m. at the Exhibition Centre of Herning.

Agromek '79 presents the entire agricultural machinery and mechanization trade in one common exhibition which enables both Danish and foreign buyers to get an overall survey of the market.
Exhibition of elite breeding animals including approx. 100 head of cattle and approx. 30 pigs from the best Danish herds.
Agromek '79 is open daily from 9 a.m. to 5 p.m.
Information about Agromek '79 can be obtained from the Secretariat: Agromek '79, 35 D Holmetoften, DK-8270 Højbjerg, Denmark.

Organizers:
Danish Manufacturers of Internal Agricultural Mechanization Equipment,
The Association of Danish Manufacturers of Agricultural Machinery and
The Danish Farmers Association.

23-27 January 1979 in Herning - Denmark

Overseas trade export services

Freepost reader service

For further information on items in this section, circle the corresponding number on the reader services page near the end of the magazine.

Meadows extends services to US west coast . . .

Meadows Airfreight has introduced a twice-weekly consolidation service to Los Angeles and San Francisco.

The services will operate every Thursday and Sunday from Heathrow Airport using the non-stop services available through British Airways.

Pre-booked allocation with the airline makes sure that cargo moves on the designated flight. Meadows' United States' associates Airborne Freight Corporation, which has over 80 offices throughout the country, handles the break-bulk operation.

The introduction of the Los Angeles and San Francisco services in the British Airways contract has enabled Meadows Airfreight to pass on the benefits to its customers by reducing consolidation rates by an average of 72 per cent.

Further information: circle 246

. . . and publishes an A to Z

From Alborg to Zanzibar – that's the coverage in a recently published guide to the international movement of containerised cargo, conventional and heavy-lift shipments by freight forwarders Thomas Meadows.

The A to Z has been produced as a folder containing eight separate data sheets detailing what Meadows has to offer as one of the leading international forwarders of deep sea cargoes.

The folder contains data on Meadows services and information on technical hints and technology, documentation, freight terms and registration, lorry pre-booking schemes and CAN numbers, as well as details of Meadows' international network of offices.

Further information: circle 247

ML uses bigger ships on Montreal run

From the beginning of next January, Manchester Liners will be operating two new purpose-built cellular containerships, the *Manchester Reward* and *Manchester Renown*, on the company's UK-to-Montreal route. These ships replace the smaller *Manchester Challenge* and *Manchester Courage*, both of which have been sold.

The *Reward* and the *Renown* are both of 12 577 gross tons, have a speed of 18½ knots and a capacity of 582 teu; they were built in 1974.

The *Renown* and *Reward* are designed to be fully convertible between 40-ft and 20-ft containers.

All the containerships of the transatlantic fleet of Manchester Liners are specially ice-strengthened and extra-powered to cut their way through ice to Montreal.

Further information: circle 248

Hull to Fiji: every month by Bank Line

A monthly direct container/unitised cargo service from Hull to Suva and Lautoka has been introduced by Bank Line. The service began with the *Corabank* loading at the end of November.

The service, the line says, will now be operated by fast composite cargo liners of the *Cedarbank* class offering the trade break bulk, full or less-than-container loads in 20 ft containers, bulk liquids, reefer space and heavy lifts up to 50 tons.

These 18-knot vessels, which the Bank Line considers to be ideal for this type of trade, will offer improved transit times to all the main destinations: Papeete, Suva, Lautoka, Noumea, Port Moresby, Lae, Rabaul and Honiara.

Occasional regular calls will be made at Madang, Yandina and Tarawa, while cargo for other ports can be accepted with transhipment. At the present time 20 ft fcl/lcl containers are being offered for Fiji although only fcls can be accepted for the other direct destinations. The Bank Line anticipates extending lcl facilities to the other ports in due course.

Lcl depots are available for Fiji cargo at Coetbridge (Glasgow), Speke (Liverpool), Slic (London) and 18 shed King George V Dock (Hull) on the basis of continuous receiving. Fcl boxes can be accepted throughout the UK.

Further information: circle 249

Pandair extends Cargocentre

Pandair, P&O International Airfreight, is expanding its Heston operations with a new 48 000 ft² warehouse alongside the cargo-centre to cope with rapid growth in air cargo movements.

Originally the Cargocentre was planned to meet forecast expansion until the end of 1978, but within 18 months of opening the 50 000 ft² Cargocentre is now fully utilised.

The new building, will initially be divided into three 16 000 ft² areas, two of which will be leased out on short-term agreements. The new warehouse area will be fitted up with the same sophisticated handling and storage equipment as the original.

Further information: circle 250

New depots for US groupage service

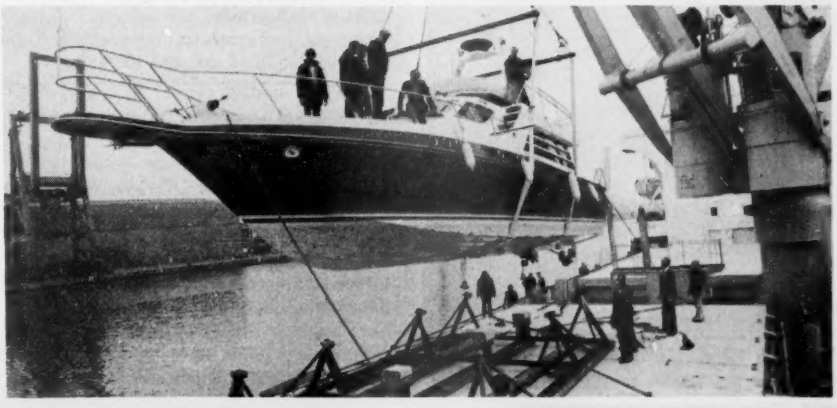
Constantine Group has added Birmingham and Manchester to London, as receiving depots for its scheduled weekly groupage container services to the United States. The destinations served include New York, Boston, Chicago and Minneapolis.

Further information: circle 251

Yacht on a ship to Middle East

A 50-foot Tarquin motor yacht worth £250,000 being loaded on to a ship at Tilbury, for transport to a wealthy owner in Kuwait. All arrangements were made by Gulf Express and this movement is one of the first to come out of a new organisation specialising in Kuwait, comprising the Pan Group (Pan Express and Pan Arabian Transport) Gulf Express and Euro-Arab who are based in Kuwait.

Further information: circle 252



Overseas trade country data

Australia

Protective helmets. The Australian Minister for Business and Consumer Affairs announced on 14 November the adoption under the Trade Practices Act of a safety standard for protective helmets used by motorcyclists on public roads. Henceforth this type of helmet must comply not only with Australian Standard 1698-1974 for protective helmets for vehicle users but also they are required to bear the emblem of the registered certification mark of the Standards Association of Australia, encircled by the words 'Approved to Australian Standard 1698'.

Inquiries: CRE 01-215 5319.

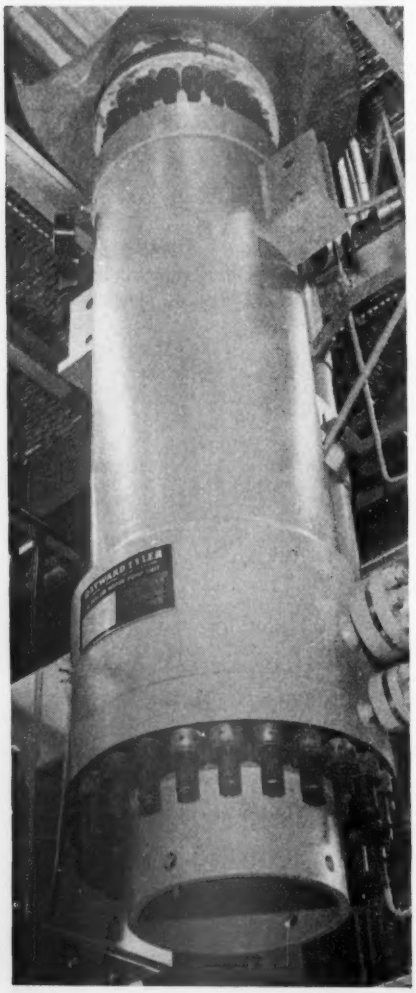
Ref: CRE 35184.

Knife belts. The Australian Minister for Business and Consumer Affairs announced on 21 November that action was being taken under the Trade Practices Act to declare as unsafe goods the 'Bowen knife belt' and similar belts incorporating a concealed blade. The import of belts of this description into Australia has been prohibited.

Inquiries: CRE 01-215 5319.

Ref: CRE 43900. CRE 43897.

Hayward Tyler, of Luton, a member of Stone-Platt Pumps, has won a big order for glandless wet stator motor-driven circulating pumps for Australia. The 1700 hp pumps, for boilers to be erected at the Loy Yang power station, will be supplied with two spare motors and spares, making the contract worth over £2 million.



Chile

Used or second-hand commercial vehicles etc. As a result of a change in Chilean regulations, the import of certain types of used or second-hand commercial vehicles and tractors will now be permitted.

The vehicles are regarded as second-hand when the date of manufacture is in a prior calendar year to that in which the import licence is submitted for approval to the Central Bank.

The items affected, which fall within tariffs 87.01 to 87.04, are:

Wheeled and caterpillar tractors, trolleybuses and buses (with a seating capacity exceeding 15), ambulances, prison vans and hearses, three-wheeled delivery vans, trucks with overall weight exceeding 25 tons, fire engines, snow sweepers, workshop and towing vans, bus chassis.

Inquiries: OTAR 01-248 5757 ext. 474/476.

France

Imitation pearls. An order was published in the French *Official Journal*, 17 November, forbidding the use of lead salts for the production of coverings of imitation pearls used in pieces of jewellery, and forbidding the sale and import of such pearls.

Copies of the French text are available from OTAR 01-248 5757 ext. 423/408/439.

Lebanon

Import of pharmaceuticals. The Lebanese health authorities have announced that any person can now import registered medical products, subject to obtaining an import licence beforehand. Up to now, the right to import has been limited to licensed importers only.

This measure is said to be aimed at 'curtailing price manipulation by (licensed) importers which has led to a sharp increase in prices'.

Inquiries: OTAR 01-248 5757 ext. 475/7062.

Libya

Import licensing. The Secretariat of Trade has announced that as from 1 January 1979 all permitted imports will require an import licence.

Import licences will only be granted to:

1 Public establishments, organisations and companies;
2 Co-operative societies;
3 Establishments 'run by the people'.

Inquiries: OTAR 01-248 5757 ext. 462.

Mexico

Import licensing. An Acuerdo of the Secretaria de Comercio published in the *Diario Oficial*, 8 November, states that import licences are no longer required for goods in the following headings:

29.34.A.006, 90.10.B.001, 90.10.B.003

Inquiries: OTAR 01-248 5757 ext. 476/474.

Morocco

Import duties. The Ministry of Finance has announced some modifications and changes in duty in tariff items 82.23 and 39.02.

Inquiries: OTAR 01-248 5757 ext. 462.

Pakistan

Medicines and drugs. The government of Pakistan *Official Gazette*, 8 October, contained a draft of the proposed Drugs (Labelling and Packing) Rules 1978.

Subject to consideration of any objections or

Further information

In many cases further information on the notices published on these pages is available to British exporters from the Department of Trade. The main branches concerned are: Commercial Relations and Exports (CRE) Divisions, 1 Victoria Street, London SW1H 0ET (tel: direct dialling); and Overseas Tariffs and Regulations Section (OTAR), Export Data Branch, Export Services and Promotions Division, Export House, 50 Ludgate Hill, London EC4M 7HU, tel. 01-248 5757. In each case, the relevant information source is indicated at the end of the notice by its initials (OTAR or CRE) and, in the case of OTAR, the telephone extension.

suggestions, which had to be submitted by 7 November, these rules are due to become effective on 1 July 1979.

A copy of the *Official Gazette* may be obtained by British exporters from OTAR, tel. 01-248 5757 ext. 420/7062.

Papua New Guinea

Visa regulations. On 1 November the Papua New Guinea (PNG) authorities introduced new entry regulations, on a trial basis of 12 months, for visitors arriving at Jacksons Airport, Port Moresby only. These apply to visitors from a number of countries, including Britain and dependent countries.

Under the new regulations tourists visiting PNG for less than 30 days will not require a visa. Visitors from qualifying countries will be assessed on arrival at Jacksons Airport, and, should they be deemed to be tourists and meet the following basic requirements, they may be issued a permit to remain in PNG:

1 Must not be adversely recorded by PNG authorities;
2 Must have sufficient funds to maintain themselves for the duration of their stay in PNG;
3 Must be in possession of an onward or return ticket to a country for which entry rights are assured;
4 Passports bear automatic or specialised returnability.

Those who do not meet these general conditions are unlikely to qualify for admission to PNG.

Under the regulations those wishing to enter PNG at other ports of entry or persons in the following categories will still need to obtain a visa before arriving in PNG:

1 Tourists who intend staying longer than 30 days;
2 People visiting friends or relatives;
3 Trade union officials;
4 Visitors entering PNG for business, research, journalistic purposes or for reasons other than tourism.

For further details contact the Papua New Guinea High Commission, 14 Waterloo Place, London SW1, tel. 01-930 0922.

Solomon Islands

Soap. Following the Solomon Islands budget the import duty rate for household soaps in blocks and bars (commodity item 554.11), at present free of duty, will be subject to a 50 per cent import duty charge from 1 December.

Inquiries: OTAR 01-248 5757 ext. 468/469/401.

South Africa

Tariff application. Customs tariff application list 38/78, published in the South African *Government Gazette*, 17 November, contains an application to the Board of Trade and Industries for increase in duty on:

1 Gate or sluice valves, ball or plug valves and butterfly valves and parts thereof, classifiable under tariff heading 84.61.
2a Inflatable splints classifiable under tariff subheading 90.19.90.
2b Anti-noise ear protectors, classifiable under tariff subheading 39.07.90.65.
3 Forks, classifiable under tariff subheading 82.01.90. This application supercedes the application in list number 34/78 of 20 October.

Those British trade organisations thought to be interested in the applications are being informed. Any British firm affected which wishes to make representations to the South African Board of Trade and Industries and belongs to a trade organisation should, therefore, first contact its own trade association.

If any firm proposes to make independent representations to the South African authorities and requires further information concerning the applications it should address inquiries to CRE 01-215 5274.

Spain

Opening of commercial establishments. The Spanish *State Gazette*, 11 August, published royal decree 1884/1978 covering the opening of commercial establishments in Spain by physical persons of foreign nationality.

An English translation of this decree is available on request from OTAR 01-248 5757 ext. 461/458/459/460.

Sweden

Price freezes. Price freezes have been introduced in Sweden from 19 October on the following products.

Plastic flooring, diapers and soft tissue paper.

Inquiries: OTAR 01-248 5757 ext. 488/461.

Switzerland

Foodstuffs. The Federal Department of the Public Economy has issued an amended list of price supplements relating to foodstuffs. Goods within the following CCCN numbers are affected:

05.07, 05.15, 07.05, -06, 08.05, 10.01-07, 11.01-02, 11.04-05, 11.07-08, 12.01-04, 12.08-10, 14.05, 15.01-03, 15.06-07, 15.12-13, 18.02, 21.06, 23.01-04, 23.06-07

Further information on rates and extracts of this order (in French only) are available from OTAR 01-248 5757 ext. 459.

United States

Speciality steel. Imports in pounds weight from the EEC for the product under quota as at 3 November:

Plates of stainless steel (item 923.21)	3 064 204

Inquiries: CRE 01-215 5397.

Motor vehicles: fields of view. The United States *Federal Register*, 6 November, issued two notices of proposed rulemaking by the Department of Transportation.

The first notice, rear-view mirror systems, proposes amendments to the federal motor vehicle safety standard that would upgrade the requirements for rear-view mirror systems on all motor vehicles.

The second notice, fields of direct view, proposes a new federal motor vehicle standard that would establish requirements for a minimum field of view through the windshield, the luminous transmittance of glazing materials, the location and functional characteristics of sun visors, the maximum allowable size of obstructions in the field of view of drivers of motor vehicles, and the minimum view of pedestrians from buses.

Comments for both notices must be received by 6 March 1979.

Inquiries: CRE 01-215 5629.

Titanium dioxide. The United States Treasury, on 25 October 1978, formally opened an anti-dumping investigation into the supply of titanium dioxide from Belgium, France, West Germany and the United Kingdom. The International Trade Commission voted, on 21 November, that there was not 'no reasonable indication of injury' and consequently the case is returned to the Treasury for a full investigation which is due by 25 April 1979.

Two UK suppliers have been identified in the petition, but any other UK exporters of this product who have not so far been implicated may request inclusion in the investigation if they so desire.

This suggestion is offered because an individual exporter cannot qualify for exclusion from a possible withholding of appraisement, determination of sales at less than fair value, or finding of dumping unless all sales from the exporter are examined as under section 153.38 of the US customs regulations and found to be made at not less than fair value.

Furthermore, potential future exporters of this product are advised that if a finding of dumping occurs, future shipments from them to the United States would be subject to the finding. The fact that they are not, would not exclude them from a finding.

Inquiries: CRE 01-215 5397.

Book matches. The *Federal Register*, 17 November, published a revised final safety standard for book matches by the Consumer Product Safety Commission.

A copy of the text is available from OTAR 01-248 5757 ext. 456/457/7312.

Child-resistant packaging. The *Federal Register*, 17 November, published a rule by the Consumer Product Safety Commission exempting hazardous substances in containers with a capacity of 5 gallons or more from child-resistant packaging.

A copy of the text is available from OTAR 01-248 5757 ext. 456/457/7312.

Fishery products. The *Federal Register*, 15 November, published a rule proposed by the National Marine Fisheries Service to establish guidelines, standards and procedures for fishery products inspected by the NMFS. Written comments should be sent by 13 February 1979 to National Marine Fisheries Service, Washington DC 20235.

A copy of the text is available from OTAR 01-248 5757 ext. 456/457/7312.

Uruguay

Import tariff and surcharge amendments. The government of Uruguay has passed several decrees amending the import tariff and the surcharge list for the following headings:

15.02, 25.32, 27.10, 27.14, 32.05, 32.06, 32.07, 32.12, 38.16, 39.02, 39.07, 48.01, 51.04, 62.05, 68.16, 73.24, 73.31, 76.16, 84.11, 84.20, 90.17 and 98.03.

Inquiries: OTAR 01-248 5757 ext. 474/476.

Statistics

The economy: selected indicators

Series are seasonally adjusted except where shown otherwise

	Gross domestic product (average estimate)	Consumers' expenditure	Fixed capital expenditure			Changes in stocks				Balance of payments		
				of which			of which					
			Total	Manufacturing industry	Distributive and service industries excl. shipping	Total	Manufacturing industry	Wholesalers [1]	Retailers [1]	Current balance	Visible balance	Invisible balance
	at 1975 prices		at 1975 prices			at 1975 prices				at current prices		
Base of index Series in Stock level at end-1977	1975	£ million	£ million			£ million				£ million		
						34,469	20,261	4,540	3,181			
1971	94.5	59 340	20 208	3 923	3 888	235	−277	218	12	1 090	261	829
1972	96.7	62 762	20 239	3 398	4 055	73	−279	173	29	135	−722	857
1973	103.4	65 497	21 609	3 504	4 674	2 983	1 336	432	624	−999	−2 383	1 384
1974	101.4	64 070	21 164	3 822	4 605	1 462	1 288	361	−180	−3 591	−5 235	1 644
1975	100.0	63 192	20 817	3 522	3 841	−1 925	−1 221	−249	−100	−1 855	−3 236	1 381
1976	102.9	63 320	20 489	3 345	3 926	261	316	131	13	−1 137	−3 589	2 452
1977	104.8	62 732	19 738	3 573	4 325	1 051	442	266	29	406	−1 709	2 115
1976 2nd qtr	102.8	15 785	5 137	828	972	−34	−29	−10	−67	−315	−949	634
3rd qtr	103.3	15 884	5 168	849	1 005	173	99	81	46	−417	−1 132	715
4th qtr	104.0	15 927	4 997	856	1 014	211	260	17	27	−326	−958	632
1977 1st qtr	103.7	15 619	4 794	851	1 030	475	235	82	117	−480	−973	493
2nd qtr	104.6	15 495	5 025	879	1 044	336	97	179	4	−280	−762	482
3rd qtr	105.2	15 777	4 965	910	1 103	−7	−6	−80	−59	575	31	544
4th qtr	105.7	15 841	4 954	932	1 149	247	116	85	−33	591	−5	596
1978 1st qtr	105.9	16 361	5 015	920	1 169	324	38	81	62	−413	−642	229
2nd qtr	107.6	16 373	5 024	960	1 180	386	272	−62	128	126	−182	308
3rd qtr		16 686 pe		970	1 168		69	9	54	−26	−342	316
% change last 2 qtrs on prev. 2 qtrs.	+1.2	+2.7	+1.2	+4.2	+1.3							
on a year earlier	+2.5	+5.7	+2.2	+7.9	+9.4							

	Industrial production		Personal expenditure		Prices and earnings					Labour (UK)			Visible trade (volume)	
	Total all industries	Total manufacturing industries	Retail sales	Cars: new registrations	Retail prices		Wholesale prices: all manufacturing industry		Average gross earnings of all employees (GB, all industries and services covered)	Unemployed excluding school leavers and adult students		Unfilled vacancies for adults	Export	Import
				monthly averages		% increase on a year earlier	basic materials and fuel used	manufactured products: home sales		mid-month count	% of total employees	mid-month count	On a balance of payments basis	
	at 1975 prices		at 1971 prices		(not seasonally adjusted)				(old series)				at 1975 prices	
Base of index £m in base year Series in	1975	1975	1971 16,296	thousands	Jan. 1974		1975	1975	Jan. 1970	thousands		thousands	1975 19,463	1975 22,699
1971	99.8	97.4	100.0	108.5	80.0	9.4	23.2	47.6	118.7	775.8	3.4	130.9	85.4	85.7
1972	102.0	100.0	105.3	136.6	85.7	7.1	24.2	50.1	134.0	854.9	3.7	147.3	85.2	95.3
1973	109.5	108.4	110.3	137.1	93.5	9.1	55.8	66.6	152.1	611.0	2.6	307.0	97.8	108.7
1974	105.1	106.5	109.0	102.8	108.5	16.0	86.3	81.9	179.1	599.7[1]	2.6[1]	302.7[1]	104.3	109.7
1975	100.0	100.0	106.7	97.2	134.8	24.2	100.0	100.0	226.6	929.0	3.9	150.0[1]	100.0	100.0
1976	102.0	101.4	106.5	104.7	157.1	16.5	127.0	117.3	261.9	1 269.8[1]	5.4[1]	120.4[1]	109.8	105.7
1977	105.8	102.9	103.6	107.1	182.0	15.8	145.6	140.6	288.5	1 378.1	5.8	155.6[1]	118.9	107.0
1977 1st qtr	105.6	103.9	103.3	104	174.1	16.5	144.8	133.0	280.0	1 329.5	5.6	..	115.8	109.4
2nd qtr	105.5	102.4	102.5	103	181.9	17.4	148.8	139.6	285.3	1 340.6	5.6	157.7	118.0	109.6
3rd qtr	106.3	103.3	104.3	112	184.7	16.5	146.5	143.8	288.3	1 414.6	5.9	151.9	124.4	106.6
4th qtr	105.9	102.1	104.4	110	187.4	13.1	142.2	145.8	300.4	1 427.8	6.0	160.1	117.6	102.7
1978 1st qtr	107.1	102.5	106.3	129	190.6	9.5	140.2	149.2	310.8	1 409.4	5.9	187.7	119.5	114.1
2nd qtr	111.1	105.0	108.0	130	195.8	7.7	146.3	151.8	329.0	1 372.7	5.7	210.3	122.0	110.3
3rd qtr	110.6	104.8	110.9	132	199.2	7.6	144.9	154.8	334.6	1 380.5 p	5.8	213.0	125.3	116.1
1977 Oct	105.7	101.8	102.7	116	186.5	14.1	143.7	145.3	295.8	1 431.5	6.0	156.0	119.0	101.4
Nov	105.6	101.7	103.1	108	187.4	13.0	142.0	145.7	300.5	1 429.6	6.0	159.4	115.1	98.5
Dec	106.4	102.8	106.9	104	188.4	12.1	141.0	146.3	304.8	1 422.3	6.0	165.0	118.8	108.1
1978 Jan	106.9	102.4	104.9	125	189.5	9.9	139.4	148.3	306.3	1 419.2	5.9	180.3	111.2	114.4
Feb	107.4	102.2	106.8	120	190.6	9.5	139.1	149.2	311.2	1 409.0	5.9	187.0	127.0	111.1
Mar	107.1	102.9	107.0	142	191.8	9.1	142.0	150.0	314.8	1 400.0	5.9	195.8	120.4	116.7
Apr	111.4	105.5	106.7	132	194.6	7.9	145.1	150.9	325.7	1 387.1	5.8	203.7	125.6	104.4
May	110.1	103.7	108.4	124	195.7	7.7	146.8	151.9	327.2	1 366.4	5.7	209.9	119.0	114.7
Jun	111.7	105.9	108.7	133	197.2	7.4	147.0	152.7	334.0	1 364.7	5.7	217.4	121.4	111.8
Jul	111.1	105.2	111.4	108	198.1	7.8	145.8	153.8	332.7	1 371.4	5.7	211.0	126.3	116.1
Aug	110.9	105.2	111.8	146	199.4	8.0	144.2	154.8	333.2	1 392.1	5.8	209.3	124.4	111.3
Sep	109.8 p	104.0 p	109.5	144	200.2	7.8	144.8	155.7	337.8 p	1 378.3	5.8	218.7	125.1	120.8
Oct			109.6	131	201.1	7.8	145.8 p	156.6 p		1 359.6	5.7	228.4	127.4	111.9
Nov							147.2 p	157.1 p		1 338.9 p	5.6	231.3		
% change latest 3 months														
on prev. 3 months	−0.4	−0.2	+0.7	+15.3	+1.6		+0.2	+1.8	+1.7	−1.2		+6.4	+3	+1
on a year earlier	+4.0	+1.5	+6.4	+24.2	+7.9		+1.5	+7.8	+16.0	−5.1		+46.6	+2	+11

p Provisional pe 2nd preliminary e Estimate [1] Average of available months

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Economic indicators of the industrial countries

Aggregate industrial output in the OECD area continued to improve, if moderately, in the second quarter of 1978, largely reflecting the United States' recovery from a severe winter. Incomplete production information for the third quarter suggests that the rate of growth was maintained with United States' production continuing its upward trend.

The volume of OECD exports, following a period of fairly steady growth showed a marked increase in the second quarter and imports too were at a higher level. The year-on-year rise in consumer prices in the OECD area has risen steadily from 7.9 per cent in April to 8.5 per cent in September. Unemployment overall remains high although there have been slight improvements in unemployment rates in a number of OECD countries.

Canada

There were signs of some improvement in the Canadian economic situation in the second quarter of this year. Gnp rose by 1.1 per cent in this period compared with 0.7 per cent in the first quarter. Industrial production showed a similar picture and latest information suggests that in the third quarter the increase was 1.7 per cent compared with the previous quarter.

The volume of exports, not seasonally adjusted was also up by 7 per cent in the first half of 1978 compared with the first half of 1977, while import volume fell by ½ per cent. An improved merchandise trade balance contributed to a reduced current account balance of payments deficit in the first half of this year compared with the same period a year earlier ($ Cdn 1.85 billion compared to $ Cdn 2.05 billion, according to 'Statistics Canada').

The year-on-year percentage increase in consumer prices which had accelerated in mid 1978 to reach 9.8 in July moderated to 8.6 in September. Unemployment in Canada still remains at a high level despite the fact that employment has risen strongly.

United States

After a disappointing start to the year caused by adverse weather conditions and the prolonged coal strike, the United States' economy strengthened in the second quarter and showed modest growth in the third quarter of 1978. Gnp which, compared with the previous quarter, had shown virtually no change in the first quarter, increased by 2.1 per cent in the second quarter and 0.8 per cent in the third. Industrial production followed a similar pattern.

Turning to trade, a strong export performance in September helped to hold down the trade deficit to $1.69 billion for the month. Against the background of a $26.5 billion deficit in 1977 this is the third time in four months that the monthly deficit has been below $2 billion. However, the cumulative trade deficit for the first three quarters of this year reached $22.7 bn compared with $17.9 bn in the same period of last year.

Domestic inflation remains a critical concern and in October a new anti-inflation programme was introduced by President Carter. The year-on-year inflation rate has continued to rise since early in 1978 and reached 8.3 per cent in September.

There has been some improvement in the unemployment situation this year. The rate has fluctuated since February around 6 per cent with the latest month, October, showing a fall in the seasonally-adjusted rate to 5.8 per cent from 6.0 per cent in September.

Japan

The recovery in activity in the first quarter

The tables have been prepared for the convenience of users who do not have access to the sources themselves. International publications (as indicated) have been used, supplemented, where available, by later reports, denoted – (e). The form of presentation adopted – indicators by subject – is for convenience only, and it must not be assumed that the indicators in the same table for different countries are strictly comparable. An attempt has been made to indicate major differences of definition, but the coverage and methods of collection vary considerably; this is partly due to different administrative procedures in various countries. Fuller details may be obtained from the sources indicated, and from the national publications of the countries concerned. Exchange rates are those used in the basic data sources. The group of industrial countries is taken as comprising the members of the Organisation for Economic Co-operation and Development (OECD) ie: western Europe, north America, Japan, Australia and New Zealand. Consumer prices apart, New Zealand is excluded from OECD totals in that insufficient information is available.

This article is the quarterly variation of the monthly series, supplementing the usual tables with those showing: gross domestic production, earnings/wages, world and industrial countries' trade, balance of payments, import and export volume and exports of manufactures.

Table 1 Industrial production (excluding construction) seasonally adjusted

Indices 1975 = 100

	Belgium	Luxembourg	France [2]	F.R. of Germany	Ireland	Italy	Netherlands	United Kingdom r	EEC [1] [3]	Canada	United States	Japan	OECD [3]
Weights in total	1.6	0.1	7.9	13.5	0.2	4.9	1.8	5.6	35.6	3.7	34.9	15.5	100
1974	111	128.1	108	106.0	107	109.7	105	105.0	107	105.7	109.8	111.7	109
1975	100	100.0	100	100.0	100	100.0	100	100.0	100	100.0	100.0	100.0	100
1976	109	106.3	109	107.3	109	111.6	106	102.7	107	105.1	110.2	111.0	109
1977	108	106.9	110	110.5	118	111.6	107	107.5	110	109.3	116.4	115.6	113
1976 1st quarter	105	104.8	107	106	106	107.4	104	100.0	105	103.4	108.0	106.6	106
2nd	110	111.6	108	107	108	111.3	106	102.7	107	105.8	109.8	110.4	108
3rd	109	103.9	110	109	110	113.1	107	102.8	108	105.3	111.1	112.7	109
4th	110	105.1	110	110	112	117.9	108	105.4	110	105.9	111.7	113.9	111
1977 1st quarter	111	107.6	113	111	114	121.0	107	107.6	112	108.5	113.4	115.3	112
2nd	109	111.1	110	110	118	112.5	108	107.5	110	108.6	116.3	115.2	113
3rd	107	101.5	109	110	117	111.7	105	108.1	110	109.4	117.5	115.1	113
4th	107	106.2	109	111	123	109.3	107	107.0	109	110.9	118.3	116.6	114
1978 1st quarter	109	114.5	111	111	127	115.3	106	108.6	111	111.6	118.5	120.0	115
2nd	109	114.7	114	111	130	112.8	106	112.0	111	113.1	122.2	122.1	116
3rd			113 e	114		113.6	107 e	111.9		115.0 e	124.5	122.9 e	
1977 June	108	112.4 e	113	110 e		108.2	106	106.3	110 e	109.6	117.0	115.6	114 e
July	105	105.3 e	111	110 e		110.1	104	107.7	109 e	109.0	117.7	113.7	112 e
August	111	91.1	111	110		111.0	104	108.3	110	109.4	117.2	115.9	113
September	105	108.3	111	111		113.9	106	108.3	111	109.8	117.5	115.7	114
October	104	101.5	109	110		109.0	106	106.7	109	110.6	117.9	115.0	113
November	107	110.9	111	110		111.3	105	106.6	110	110.8	118.3	117.0	114
December	110	106.1	111	113		107.6	109	107.6	110	111.3	118.6	117.9	114
1978 January	111	117.2	112	114		113.5	107	108.3	112	109.9	117.8	119.1	115
February	108	116.2	111	110		116.7	106	108.9	111	112.1	118.2	119.2	115
March	108	109.9	114	110		115.9	107	108.5	111	112.8	119.6	121.7	116
April	112	114.0	116	110		112.1	108	112.3	112	113.3	121.6	121.8	117
May	108	116.3	113	110		113.6	103	110.8	111	112.4	122.2	122.2	116
June	108	113.9	111	112		112.6	107	112.8	112	113.5	123.0	122.3	117
July	102	113.2	113	114		113.5	109	112.5	113	114.5	123.9	121.2	118
August	111	106.3	113	113		112.1	105	112.3	113 e	113.6	124.5	123.1	118 e
September			114 e	114		115.1 e	107 e	110.9		116.8 e	125.2	124.5	
October											125.8 e		
% change latest three months on previous three months	−2.1	−2.0	—	2.7	2.4	0.7	0.9	−0.1	1.2	1.7	1.7	0.7	1.1
On a year earlier	−0.9	8.0	2.1	3.0	10.2	1.7	2.2	3.5	2.7	5.1	6.5	6.8	4.1

[1] Excluding Denmark. [2] Yearly and quarterly data have more complete coverage than monthly data. [3] The monthly figures for OECD and EEC are weighted by Department of Trade consistent with the quarterly figures published by OECD. e Estimated. r Revised.
Source: United Kingdom, Department of Trade; all others 'OECD Main Economic Indicators'.

Table 2 Gross domestic production seasonally adjusted Indices 1975 = 100

	Canada [1]	United States [1]	Japan [1]	Italy	France [2]	FR of Germany [1]	United Kingdom
1974	99	101	99	104	100	102	101
1975	100	100	100	100	100	100	100
1976	106	106	106	106	106	106	103
1977	108	111	112	108	108	108	105
1975 1st qtr	99	97	97	100	98	99	100
2nd	99	99	100	99	100	99	100
3rd	100	101	101	99	99	100	99
4th	101	102	103	102	102	102	100
1976 1st qtr	105	104	105	104	104	104	102
2nd	106	105	106	106	106	105	103
3rd	105	106	107	106	106	106	103
4th	106	107	108	108	107	107	104
1977 1st qtr	107	109	110	110	109	108	104
2nd	108	110	112	107	107	108	105
3rd	108	112	112	107	108	108	105
4th	110	113	114	106	108	110	106
1978 1st qtr	111	113	117	108 e	110	110	106
2nd	112	115	118	109 e		112	108
3rd		116					
% change latest quarter							
On previous quarter	1.1	0.8	1.1	0.4	1.8	2.1	1.5
On a year earlier	3.7	3.7	5.3	1.5	1.5	3.8	2.9

[1] Gnp at market prices. [2] Annual and quarterly figures are on a different basis. e Estimated figures. r Revised
Source: IMF International Financial Statistics; UK Central Statistical Office.

appears to have slowed down. Following a 2.5 per cent increase in real gnp in the first quarter, there was a rise of 1.1 per cent in the second to which the biggest single contribution was provided by public sector spending. Industrial production increased by about 3 and 1¾ per cent in the first and second quarters respectively, but provisional figures suggest slower growth in the third quarter.

Compared with a year earlier export volumes increased in the first half of this year; however figures are thought to have been distorted by accelerated deliveries in anticipation of higher freight rates for northern pacific shipping routes and a longshoremen's strike on the west American coast in July. Import volumes also increased. It is reported that the preliminary surplus on the balance of payments current account for the first half of fiscal 1978 (April-September) increased to $9.73 billion from $5.44 billion in the corresponding period of last year. The year-on-year increase in consumer prices bottomed out at 3.5 per cent in May/June and averaged 4 per cent in the third quarter. Unemployment since the beginning of the year has tended to rise.

Federal Republic of Germany

After the improvement shown at the end of 1977 gnp remained virtually unchanged in the first quarter of 1978 but picked up again by 2.1 per cent in the second quarter. Industrial production remained unchanged from the last quarter of 1977 through to the second quarter of the year; however, provisional figures for the third quarter suggest a marked improvement. Both export and import volumes (seasonally adjusted) increased in the first three quarters of 1978 compared with a year earlier, by about 5 and 8 per cent respectively.

Press reports indicate that the trade surplus in the first nine months of this year stood at 28.5 billion marks (compared to 26.3 billion marks in the corresponding period of 1977). Using the same comparison the current account was in surplus of 6.5 billion marks, against a nil balance in the first three quarters of 1977.

Apart from a temporary increase in July, the year-on-year inflation rate fell steadily during the first nine months of this year assisted by falling import prices and despite increases in VAT rates in January. In September it stood at 2.2 per cent giving Germany the lowest inflation rate of the major industrial countries. Following a fall in the number of registered unemployed in the second quarter of this year, the situation deteriorated in the summer. However, figures available for September and October suggest an improvement.

France

The recovery in activity which began in the second half of 1977 continued in the early months of 1978 but the latest information sug-

Table 3 Unemployment seasonally adjusted* Numbers thousands

	Belgium [3]	Denmark [1,7]	France [1,8]	F.R. of Germany [1]	Ireland [3]	Italy [4,8,9]	Nether-lands [1]	United Kingdom [1,3]	Canada [4]	United States [4]	Japan [4]
1974	105	*50*	*498*	583	48	*560*	135	600 [5]	521	5 076	740
1975	177	*124*	*840*	1 074	75	*654*	195	929	697	7 830	1 000
1976	229	*126*	*933*	1 060	84	*732*	211	1 270	736	7 288	1 080
1977	264	164	*1 073*	1 030	82	1 545	204	1 378	862	6 856	1 100
1976 1st quarter	213	*118*	*929*	1 136	82	*681*	211	1 220	703	7 224	1 072
2nd	227	*115*	*928*	1 040	84	*693*	209	1 261	728	7 111	1 102
3rd	238	*120*	*925*	1 031	85	*776*	217	1 300	748	7 363	1 101
4th	238	*126*	*942*	1 014	84	*777*	206	1 313	770	7 443	1 038
1977 1st quarter	246	147	*997*	1 018	82	1 459	197	1 330	826	7 161	1 032
2nd	261	156	*1 069*	1 025	83	1 432	200	1 341	852	6 889	1 110
3rd	276	163	*1 149*	1 054	83	1 692	213	1 415	878	6 736	1 150
4th	276	172	1 073	1 023	80	1 598	205	1 428	900	6 554	1 126
1978 1st quarter	275	185	1 055	1 014	78	1 520	197	1 409	910	6 155	1 146
2nd	285	183	1 141	984	76	1 455	201	1 373	943	5 962	1 267
3rd	288	185	1 251	1 008		1 658	217	1 380	938	6 054	1 313
1977 May	262	157	*1 066*	1 019	83		200	1 324	840	6 894	1 127
June	267	160	*1 105*	1 041	83		205	1 364	848	6 904	1 172
July	272	161	*1 140*	1 059	83		208	1 399	866	6 719	1 189
August	282	163	*1 174*	1 059	84		217	1 410	881	6 821	1 143
September	275	165	*1 132*	1 043	82		213	1 435	887	6 668	1 118
October	272	167	1 097	1 034	81		209	1 432	887	6 688	1 055
November	283	171	1 068	1 027	81		206	1 430	903	6 663	1 150
December	272	177	1 054	1 009	79		200	1 422	911	6 310	1 172
1978 January	274	181	1 028	1 002	78		199	1 419	891	6 226	1 112
February	274	183	1 050	1 028	77		196	1 409	901	6 090	1 150
March	278	191	1 086	1 012	77		197	1 400	938	6 148	1 175
April	282	184	1 106	978	77		196	1 387	935	5 983	1 198
May	289	182	1 132	987	76		201	1 366	949	6 149	1 273
June	286	182	1 186	989	74		205	1 365	944	5 754	1 329
July	286	183	1 241	1 009	74		210	1 371	927	6 193	1 304
August	295	186	1 277	1 020			222	1 392	941	5 968	1 305
September	283	189	1 235	997			218	1 378	946	6 002	1 331
October	294 e		1 215	982 e				1 360		5 870	
November								1 339			
Rate % latest month	10.9 e	8.7	6.4	4.3 e	10.5	7.5	5.5	5.6	8.5	5.8	2.4
% change latest three months											
On previous three months	1.3	1.8	4.7	0.5	−3.0	14.0	8.0	−1.2	−0.5	−1.4	3.7
On a year earlier	5.2	14.1	n.a.	−4.4	−10.0	−2.0	1.9	−5.1	6.8	−11.6	14.2

*Unemployment data are defined and collected on different bases in different countries. The following notes indicate main variations preventing direct international comparison. [1] Numbers registered at employment offices. Rates are calculated as percentages of total employees. [2] Excluding school leavers. [3] Insured unemployed. Rates are calculated as percentages of total insured population. [4] Labour force sample survey. Rates are calculated as percentages of total labour force. The quarterly data for Italy relate to January, April, July and October. [5] Estimated in the absence of one month's figures. [6] From 1977, new method of calculating unemployment which is not consistent with the previous figures. [7] From 1977, including unemployed insured for loss of part time jobs. [8] Not seasonally adjusted. [9] Data from October 1977 to April 1978 are affected by administrative changes which tend to reduce the figures. e Estimated. n.a. Not available. Source: 'OECD Main Economic Indicators' and *Department of Employment Gazette*.

Table 4 Earnings/wages per head in manufacturing

Indices 1975 = 100

	Belgium [1]	Denmark [2 3]	France [4]	FR of Germany [1]	Ireland [4]	Italy [1]	Nether-lands [1]	Great Britain [4]	Canada [7 8]	United States [8]	Japan [4 6]
1974	84	84	88	92	78	79	88	79	86	92	90
1975	100	100	100	100	100	100	100	100	100	100	100
1976	113	113	114	106	117	121	109	117	114	108	113
1977	123	124	128	114	135	155	117	129	126	117	123
1974 1st quarter	77	78	79	88	70	73	83	70	81	88	78
2nd	82	83	84	91	77	77	87	76	84	90	89
3rd	87	86	89	93	80	81	91	82	89	93	92
4th	91	91	92	94	84	85	91	88	92	96	94
1975 1st quarter	95	95	94	98	91	94	96	93	96	98	97
2nd	99	100	96	100	98	100	98	97	99	99	96
3rd	101	101	101	101	104	102	102	103	101	101	102
4th	105	105	103	101	108	104	103	108	104	103	103
1976 1st quarter	109	108	106	103	111	107	107	111	109	105	108
2nd	111	112	111	105	114	116	107	116	113	106	110
3rd	114	114	115	107	118	128	109	118	116	109	113
4th	116	118	119	107	126	133	111	122	118	111	117
1977 1st quarter	120	118	121	111	127	142	113	124	122	113	120
2nd	122	123	124	113	133	152	115	127	125	116	122
3rd	124	126	128	115	137	160	119	128	128	118	124
4th	126	129	132	115	143	165	119	135	130	121	126
1978 1st quarter	127	132	134	116		171	122	139	132	124	130
2nd	129	136	138	118		176	122	147	133	125	131
% change latest quarter											
On previous quarter	1.6	3.0	3.0	1.7	4.4	2.9	—	5.8	0.8	0.8	0.8
On a year earlier	5.7	10.6	11.3	4.4	13.5	15.8	6.1	15.7	6.4	7.8	7.4

[1] Hourly rates. [2] Hourly earnings. [3] Including mining. [4] Weekly earnings (all employees). [5] Gross hourly earnings per production worker. [6] Monthly earnings: regular workers. [7] Hourly earnings for firms employing 20 persons and over. [8] Seasonally adjusted. [9] Hourly rates manufacturing, adjusted for change in hours worked. Annual figures are centred by averaging data from January of current year to January of following year.

Sources: All countries 'OECD Main Economic Indicators', except Great Britain (MEI and *Department of Employment Gazette*)

Table 5 Consumer prices All goods and services

Indices 1975 = 100

	Belgium	Luxem-bourg	Denmark	France	F.R. of Germany	Ireland	Italy	Nether-lands	United Kingdom	EEC	Canada	United States	Japan	OECD
1974	88.7	90.3	91.3	89.6	94.4	82.7	85.5	90.7	80.5	88.9	90.3	91.6	89.4	90.0
1975	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0
1976	109.2	109.8	109.0	109.6	104.5	118.0	116.8	108.8	116.5	110.3	107.5	105.8	109.3	108.6
1977	116.9	117.2	121.1	120.4	108.6	134.1	138.3	115.8	135.0	121.7	116.1	112.6	118.1	118.5
1976 1st quarter	106.1	106.7	104.0	105.8	103.2	110.7	108.1	105.1	110.9	106.2	105.2	103.7	105.5	105.3
2nd	108.2	109.0	108.2	108.3	104.7	117.6	115.0	108.6	114.9	109.4	106.7	104.9	108.9	107.7
3rd	110.2	110.8	109.8	110.8	104.9	119.3	118.2	109.4	117.6	111.2	108.3	106.6	110.1	109.5
4th	112.1	112.7	114.1	113.6	105.4	124.4	125.7	112.1	123.0	114.5	109.9	107.8	112.8	111.9
1977 1st quarter	114.3	115.3	115.3	115.4	107.3	129.1	131.6	113.0	129.2	117.6	112.3	109.7	115.3	114.6
2nd	116.2	117.1	119.0	118.9	108.8	134.0	136.6	115.8	134.9	121.0	114.9	112.1	118.4	117.7
3rd	117.9	117.9	122.0	121.7	109.0	135.4	140.1	116.6	137.0	122.9	117.4	113.7	118.8	119.7
4th	119.3	118.4	128.3	124.1	109.3	137.8	144.8	117.8	139.0	124.8	119.9	115.0	119.8	121.8
1978 1st quarter	120.8	119.2	129.9	126.0	110.7	139.8	148.6	118.2	141.4	126.9	122.1	116.9	120.3	124.0
2nd	121.3	120.5	132.0	129.6	111.7	142.2	153.1	119.9	145.3	129.6	125.1	120.0	122.7	127.1
3rd	122.6	121.2	133.6	133.1	111.7	146.6	156.8	121.5	147.8	131.5	128.3	122.8	123.6	129.7
1977 June	117.0	117.6	120.0	119.9	109.3		137.8	116.0	136.2	121.9	115.7	112.8	118.4	118.5
July	117.4	118.2	120.7	121.0	109.1		138.6	116.0	136.4	122.3	116.8	113.3	118.1	119.1
August	117.8	117.8	121.9	121.6	109.1	135.4	139.9	116.5	137.0	122.8	117.3	113.7	118.1	119.6
September	118.6	117.6	123.2	122.7	108.9		141.7	117.2	137.8	123.5	118.0	114.1	120.2	120.5
October	118.8	118.1	127.5	123.7	109.1		143.6	117.7	138.4	124.3	119.1	114.5	120.8	121.3
November	119.3	118.7	128.6	124.1	109.2	137.8	145.0	117.9	139.0	124.9	119.9	115.0	119.4	121.8
December	119.7	118.4	128.7	124.4	109.5		145.7	117.9	139.8	125.3	120.7	115.4	119.1	122.3
1978 January	120.3	119.0	129.2	125.0	110.2		146.9	117.5	140.6	126.0	121.2	116.1	119.6	123.1
February	120.8	119.2	129.8	126.0	110.8	139.8	148.4	118.0	141.4	126.8	121.9	116.9	120.1	124.0
March	121.1	119.6	130.7	127.1	111.1		150.3	119.0	142.3	127.7	123.3	117.7	121.2	125.0
April	121.2	120.2	131.2	128.4	111.4		151.8	119.8	144.4	128.8	123.6	118.8	122.5	126.1
May	121.4	120.4	132.3	129.7	111.7	142.2	153.2	120.0	145.2	129.6	125.3	119.9	123.2	127.2
June	121.4	120.8	132.6	130.7	112.0		154.5	119.9	146.3	130.3	126.4	121.2	122.5	128.1
July	122.1	121.0	132.9	132.3	112.0		155.4	120.8	147.0	131.1	128.3	122.0	123.0	129.0
August	122.6	121.1	133.5	133.0	111.7	146.6	156.2	121.4	147.9	131.5	128.4	122.7	123.1	129.7
September	123.1	121.4	134.4	134.0	111.4		158.7	122.4	148.5	132.3	128.1	123.6	124.6	130.7 e
Percentage change														
Latest month on same month a year earlier	3.8	3.2	9.1	9.2	2.2	8.2	12.0	4.4	7.8	7.1	8.6	8.3	3.7	8.5
Latest three months on previous three months	1.0	0.6	1.2	2.7	0.0	3.1	2.4	1.4	1.7	1.6	2.5	2.3	0.7	2.1
Latest three months on a year earlier	4.0	2.8	9.6	9.3	2.4	8.2	11.9	4.3	7.8	7.1	9.3	8.0	4.0	8.4

e Estimated.

Source: 'OECD Main Economic Indicators'.

Monthly Digest of Statistics

A compendium, compiled by the Central Statistical Office, of basic information across a wide range of 19 different subjects including population, employment and price statistics, social services, production and output, energy, construction, transport, catering, home and overseas finance, and the weather. It contains mostly runs of monthly and quarterly estimates for at least two years and annual figures for several more.

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gests that this improvement may not have been maintained. Gdp increased by 1.8 per cent in the first three months compared to the last quarter of 1977 but is reported to have slackened to 0.3 per cent in the second quarter.

After expanding strongly in the first half of the year, industrial production is estimated to have declined slightly in the third quarter.

The French trade position has improved, press reports giving a cumulative adjusted trade surplus of 1.86 billion francs in the first nine months of the year compared with a deficit of 11.64 billion francs in the same period in 1977, with the volume of exports rising faster than the volume of imports.

In the first half of 1978 consumer prices had been running at about 9 per cent higher than a year earlier. In the third quarter there was a slight acceleration in the annual rate of inflation possibly reflecting the phasing out of industrial price controls and the ending of subsidies to state run industries.

The unemployment situation remains serious. However, the effects of the national youth employment pact should be reflected in the figures for November and December. Further measures to reduce unemployment may be introduced before the end of the year.

Italy

The contractionary phase which began in the second quarter of 1977 gave way to a rapid recovery in activity in the early months of 1978, but it appears that the upswing was largely a result of temporary factors, for example, a substantial increase in pensions at the beginning of 1978. Comparisons with the previous quarter estimates of gdp suggest that it rose in the second quarter by only 0.4 per cent against the first quarter's increase of 1.8 per cent.

After expanding strongly in the first quarter, industrial production fell back in the second and is estimated to have partly recovered in the third quarter.

In the first eight months of 1978 compared with the same period a year earlier it is reported that the rise in the value of exports was nearly twice that of imports, but that the import growth had been accelerating in recent months, while that of exports was more stable. According to provisional figures published by the Bank of Italy the balance of payments closed with a surplus of more than 5,200 billion lire for the first nine months of this year.

The number unemployed for the first nine months of this year is about 1 per cent higher than for the same period last year.

The year-on-year rise in consumer prices fell steadily in each of the first three quarters this year but now seems to have levelled out at around 12 per cent. Despite this improvement the Italian inflation rate remains the highest of the main OECD countries.

Table 6 World trade

Because of problems with the data table 6 does not appear; it will be reinstated as soon as possible. Meanwhile users requiring information are asked to telephone 01-215 3126 or write to the address shown at the end of the text.

Table 7 Industrial countries' trade

Seasonally adjusted — US $ thousand million

	Exports (fob) to			Imports (cif)[2] from		
	World	OECD	Rest of world [1]	World	OECD	Rest of world [1]
1974	532.93	380.65	152.28	583.08	390.95	192.13
1975	567.80	384.53	183.27	587.38	400.06	187.32
1976	630.49	440.16	190.33	676.31	453.28	223.03
1977	715.10	497.09	218.02	765.94	509.26	256.68
1976 1st quarter	147.31	101.87	45.44	154.94	104.49	50.45
2nd	153.13	107.12	46.01	162.04	108.95	53.09
3rd	160.67	112.91	47.76	173.05	114.91	58.14
4th	166.88	117.54	49.34	182.87	122.13	60.74
1977 1st quarter	171.56	120.38	51.18	186.29	122.60	63.69
2nd	175.75	122.51	53.24	190.47	125.88	64.59
3rd	180.47	125.40	55.07	192.68	128.00	64.68
4th	188.89	129.83	59.06	198.21	133.01	65.20
1978 1st quarter [3]	195.17	134.52	60.65	205.01	139.85	65.16
2nd	208.81			214.04	148.21	65.83

[1] Includes goods for which no destination is given. [2] Imports into Canada and United States are valued fob. [3] See table 9, note 5.
Source: 'OECD Series "A" '

Table 8 Exports (fob) Special trade [1], seasonally adjusted

US $ million

	Belgium/ Luxembourg	Denmark [2]	France	F.R. of Germany	Ireland [2]	Italy	Nether-lands	United Kingdom [2]	EEC	Canada	United States [2]	Japan [2]	OECD
1974	28 260	7 716	45 900	89 160	2 628	30 288	32 436	38 827	275 100	32 784	98 508	55 536	532 932
1975	28 812	8 712	52 212	90 024	3 216	34 824	34 440	44 270	295 992	32 304	107 652	55 752	567 804
1976	32 844	9 108	55 812	102 036	3 312	36 924	38 748	46 542	325 044	38 628	114 996	67 224	630 492
1977	37 488	10 068	63 516	117 936	4 392	45 036	43 680	57 526	379 620	41 556	120 168	80 496	715 104
1976 1st quarter	7 404	2 120	13 272	23 280	740	8 475	8 907	11 474	75 618	9 099	27 219	15 564	147 309
2nd	7 746	2 225	13 851	24 609	818	8 862	8 883	11 452	78 165	9 543	28 660	16 467	153 129
3rd	8 217	2 340	14 007	26 148	837	9 414	9 909	11 523	82 507	9 822	29 384	17 037	160 668
4th	9 144	2 445	14 586	27 456	896	9 972	11 001	12 093	87 727	9 576	29 450	17 787	166 884
1977 1st quarter	9 069	2 532	15 108	27 897	962	10 467	10 623	12 977	89 492	10 359	29 786	19 479	171 558
2nd	9 123	2 357	15 252	28 788	1 014	11 481	10 536	14 292	92 571	10 179	30 574	19 710	175 752
3rd	9 261	2 526	16 242	29 541	1 200	10 971	11 220	14 950	96 152	10 374	30 609	20 181	180 465
4th	9 849	2 709	17 465	32 048	1 226	12 064	11 635	15 307	102 812	10 477	29 485	21 237	188 887
1978 1st quarter [3]	10 252	2 676	17 325	32 394	1 364	11 520	11 978	17 070 r	103 793	10 756	31 065	23 898	195 165
2nd	10 354	2 885	18 362	34 755	1 329	13 693	11 952	16 690 r	109 962	11 458	35 808	23 834	208 809
3rd								18 468 r					
1977 April	3 023	838	4 977	9 276	330	3 825	3 584	4 698	30 426	3 447	10 102	6 758	58 136
May	2 990	723	5 173	9 603	331	3 804	3 489	4 642	30 646	3 321	10 398	6 400	58 179
June	3 109	796	5 101	9 909	352	3 853	3 465	4 951	31 499	3 411	10 074	6 552	59 437
July	2 978	818	5 162	9 482	397	3 549	3 666	5 021	31 097	3 522	10 246	6 910	59 326
August	2 989	846	5 411	9 861	397	3 850	3 844	4 823	32 170	3 432	9 479	6 661	59 546
September	3 293	861	5 670	10 199	405	3 571	3 709	5 106	32 885	3 421	10 884	6 610	61 593
October	3 083	835	5 765	10 369	345	3 548	3 670	5 017	32 724	3 453	9 174	6 773	59 840
November	3 173	890	5 488	10 197	418	3 999	3 776	4 898	33 268	3 074	9 093	7 145	60 620
December	3 593	984	6 212	11 482	463	4 517	4 189	5 392	36 820	3 950	11 218	7 319	68 427
1978 January [4]	3 641	885	5 650	10 942	493	3 717	4 044	5 363	34 455	3 252	10 144	7 784	64 233
February	3 228	947	5 724	10 772	417	3 962	4 083	6 039 r	34 822	3 939	10 030	8 154	65 606
March	3 383	844	5 951	10 680	454	3 841	3 851	5 668	34 516	3 565	10 891	7 960	65 326
April	3 683	998	6 467	12 108	466	4 881	4 084	5 651 r	38 081	4 373	11 975	7 857	71 652
May	3 319	891	5 820	10 354	412	4 478	3 958	5 484 r	34 615	3 564	11 721	7 994	66 778
June	3 352	996	6 075	12 293	451	4 334	3 910	5 564 r	37 266	3 521	12 112	7 983	70 379
July	3 626	878	6 504	10 664	458		4 112	6 024 r		3 603	12 054	8 167	
August		1 044	6 384	11 996	475			6 197 r		3 482			
September								6 247 r					
October								6 578 p					

[1] See notes to table 9.

Source: United Kingdom. Department of Trade; all others: 'OECD Series "A" '.

Exports of manufactures

The United States dollar value of exports of manufactures by the main manufacturing countries rose by 14 per cent in 1977 compared with 1976, representing a volume increase of just under 4½ per cent. The UK's 1977 value share at 9.3 per cent returned to the levels of 1973 and 1975. We are not yet in a position to publish comparable share information for 1978: the special note to table 13 explains why.

Special note to table 13

Comparisons of trade in manufactures in 1978 with earlier periods may be misleading. A number of countries are now classifying their trade according to SITC (Rev 2). Countries whose figures are known to be on this classification from 1 January 1978 are United States, the Federal Republic of Germany, United Kingdom, Sweden and the Netherlands. The Netherlands publishes a conversion table which has been used to convert their statistics to the new classification. There have been other changes to the United Kingdom's external trade statistics details of which were given in an article in *Trade and Industry* of 10 February 1978. Under SITC (rev 2) there has been a change in the coverage of manufactured goods. The magnitude of the change is indicated in the table below for countries which have published figures on both SITC (R) and SITC (Rev 2) for one year.

Meanwhile, the loss of UK export price competitiveness relative to the other main manufacturing countries which began in the first quarter of 1977 appears to have continued into the first quarter of 1978, but this trend may well have been reversed in the second quarter.

EXPORTS OF MANUFACTURES (SITC 5–8) US $ billion

	SITC (R) 1977	SITC (rev 2) 1977
United States [1]	80.45	80.15
United Kingdom	46.77	47.43
Netherlands	23.87	23.79 e
Sweden	15.59	15.36

[1] Includes special category exports. e Estimated.

Inquiries: DTIPCP Common Services, Room 241A, 1 Victoria Street, London SW1H 0ET, tel. 01-215 3126.

Table 9 **Imports (cif)** Special trade [1], seasonally adjusted

US $ million

	Belgium/ Luxembourg	Denmark [2]	France	F.R. of Germany	Ireland [2]	Italy	Nether- lands	United Kingdom [2]	EEC	Canada [4]	United States [2,4]	Japan	OECD
1974	29 700	9 852	52 824	68 976	3 816	40 968	33 204	54 344	293 568	32 292	100 968	62 112	583 080
1975	30 708	10 332	54 240	74 208	3 804	38 364	35 148	53 618	300 048	33 960	96 936	57 864	587 376
1976	35 352	12 420	64 392	87 780	4 200	43 368	39 948	56 269	343 428	37 956	121 788	64 800	676 308
1977	40 248	13 260	70 488	100 704	5 388	47 556	45 600	63 740	386 940	39 540	147 852	70 812	765 936
1976 1st quarter	7 656	2 823	14 925	19 836	999	9 984	8 826	13 335	78 602	9 249	27 308	14 946	154 935
2nd	7 995	3 000	15 495	20 967	994	10 644	9 378	13 942	82 413	9 567	29 290	15 546	162 039
3rd	8 427	3 165	16 413	22 475	1 068	10 737	10 086	14 386	86 680	9 582	32 024	16 863	173 049
4th	9 174	3 330	17 493	24 078	1 121	11 859	11 607	14 606	93 334	9 486	32 652	17 256	182 874
1977 1st quarter	9 513	3 317	17 409	24 170	1 258	11 781	11 292	15 322	94 292	9 885	35 405	17 664	186 291
2nd	9 483	3 240	17 196	24 116	1 271	12 276	11 214	16 429	95 020	10 119	37 721	17 484	190 467
3rd	9 414	3 385	17 721	25 593	1 422	11 010	11 514	15 779	95 811	9 948	37 600	17 832	192 681
4th	10 143	3 344	18 658	27 435	1 481	12 458	11 816	16 210	101 804	9 840	37 640	18 099	198 207
1978 1st quarter [5]	11 066	3 411	19 018	28 054	1 551	11 637	12 317	19 023	105 698	9 694	40 778	18 444	205 014
2nd	10 844	3 530	19 609	28 977	1 722	13 147	12 636	18 752 r	108 911	11 202	43 200	18 840	214 034
3rd								20 231 r					
1977 April	3 150	1 022	5 515	7 745	406	4 167	3 727	5 183	30 872	3 425	12 593	5 859	62 327
May	3 171	1 085	5 740	8 170	426	4 206	3 727	5 394	31 863	3 391	12 334	5 850	63 430
June	3 161	1 134	5 943	8 201	439	3 902	3 761	5 851	32 285	3 302	12 793	5 775	64 710
July	2 854	1 073	5 692	8 606	461	3 700	3 788	5 475	31 510	3 328	12 781	5 788	63 761
August	3 390	1 137	6 052	8 393	468	3 736	3 963	4 936	32 140	3 257	12 167	6 067	64 609
September	3 171	1 175	5 975	8 594	493	3 574	3 762	5 369	32 161	3 364	12 652	5 978	64 311
October	3 148	1 089	5 944	8 557	472	4 144	3 741	5 337	32 562	3 268	11 954	5 769	63 591
November	3 390	1 092	6 429	8 773	477	3 910	3 911	4 998	33 321	2 961	11 581	6 006	64 162
December	3 605	1 163	6 285	10 105	532	4 404	4 164	5 875	35 921	3 611	14 105	6 324	70 454
1978 January [5]	3 723	1 147	6 503	9 824	582	3 700	4 171	6 334	35 935	3 024	12 582	6 234	68 122
February	3 719	1 134	6 137	9 252	505	4 035	4 202	6 126	34 776	3 711	14 848	6 311	69 988
March	3 624	1 130	6 378	8 978	464	3 902	3 944	6 563	34 987	2 959	13 348	5 899	66 903
April	3 593	1 184	6 724	10 104	528	4 562	4 410	5 616 r	36 408	4 275	15 328	6 549	73 360
May	3 685	1 166	6 491	9 050	593	4 672	4 237	6 637 r	36 429	3 403	14 165	6 576	70 959
June	3 566	1 180	6 394	9 823	601	3 913	3 989	6 499 r	36 074	3 524	13 707	5 715	69 715
July	3 693	1 117	6 534	9 686	593		4 425	6 568 r		3 696	15 643	6 477	
August		1 335	6 968	9 931	684			6 593 r			13 618		
September								7 070 r					
October								6 785 p					

[1] For most purposes special trade may be defined as trade excluding re-exports. [2] General trade. [4] fob. [5] In these tables, from January 1978, the trade of Ireland, United Kingdom, United States, Italy and Japan is classified according to SITC Rev 2. The changes are described in an article in *Trade and Industry* 10 February 1978, which also gives for the UK an indication of the magnitude of the change. It is thought that other countries have also adopted this classification from the beginning of 1978, but the extent of the discontinuity has not been ascertained. Percentage changes may be misleading and have therefore been omitted. p Provisional. r Revised

Source: United Kingdom, Department of Trade; All others: 'OECD Series "A" '

Table 10 **Balance of payments on current account**

US $ million (unadjusted)

	Belgium/ Luxembourg	Denmark	France	F.R. of Germany	Ireland	Italy	Nether- lands	United Kingdom	EEC	Canada	United States	Japan
1974	911	−981	−5 942	9 804	−671	−8 039	1 960	−8 398	−11 356	−1 487	1 720	−4 693
1975	705	−491	−3	4 059	−24	−556	2 001	−4 204	1 487	−4 696	18 456	−682
1976	−296	−1 909	−6 048	3 902	−262	−2 855	2 691	−2 017	−6 794	−3 841	4 339	3 680
1977	−373	−1 647	−3 301	3 799		2 285	245	560		−3 930	−15 251	10 911
1975 1st quarter	558	−82	−372	2 269		−511	137	−1 674		−1 857	4 597	−925
2nd	77	52	949	822		119	922	−949		−1 102	5 614	−300
3rd	−95	−78	−124	−395		871	277	−1 352		−659	2 008	−23
4th	165	−383	−455	1 363		−1 035	665	− 229		−1 079	6 237	566
1976 1st quarter	−369	−593	−1 319	1 377		−1 471	865	−212		−1 810	2 678	−110
2nd	30	−417	−531	904		−1 330	378	−701		−1 066	2 681	941
3rd	−293	−396	−2 477	−336		864	484	−650		−16	−2 397	984
4th	336	−504	−1 720	1 955		−977	964	−454		−948	1 377	1 865
1977 1st quarter	87	−480	−1 637	940		−1 025	167	−918		−1 484	−2 334	889
2nd	−174	−395	−477	1 089		337	−144	−509		−1 173	−2 495	2 181
3rd	−375	−398	−1 193	−2 033		2 298	−191	1 038		−511	−5 182	3 260
4th	89	−375	6	3 802		676	414	949		−762	−5 240	4 580
1978 1st quarter	−84	−509	−329	1 576		288	−325	−827		−1 276	−6 386	3 964
2nd		−91		1 944			−206	598			−2 812	4 827

Source: United Kingdom Economic Trends. All others: IMF International Financial Statistics.

Table 11 Export volume (1975 = 100) [1]

	Belgium/ Luxembourg	Denmark	France	F.R. of Germany	Ireland	Italy	Nether- lands	United Kingdom	EEC	Canada	United States	Japan	OECD
1974	108	103	105	112	95	98	105	103	106	108	102	99	104
1975	100	100	100	100	100	100	100	100	100	100	100	100	100
1976	115	103	109	113	105	112	111	109	111	112	103	121	111
1977	120	107	117	120	126	121	113	119	118	124	104	134	117
1974 1st quarter	111	104	107	115	95	98	105	99	107	110	100	90	103
2nd	111	100	104	112	90	94	105	103	106	106	105	99	105
3rd	106	104	103	110	93	101	107	107	106	111	102	101	105
4th	104	103	104	109	101	97	104	101	104	105	102	105	104
1975 1st quarter	102	98	102	100	99	98	97	100	100	100	100	103	100
2nd	94	98	97	98	90	97	96	97	97	100	96	97	97
3rd	96	98	99	98	104	100	99	98	98	98	101	96	99
4th	108	107	102	105	108	105	109	105	105	101	103	104	104
1976 1st quarter	109	98	103	108	95	108	105	105	106	108	99	116	106
2nd	112	101	110	113	106	111	105	108	110	113	104	122	110
3rd	116	106	111	116	106	112	113	108	113	114	105	123	113
4th	122	106	113	116	114	116	119	113	116	114	103	124	114
1977 1st quarter	120	108	114	116	117	117	112	115	115	124	103	136	115
2nd	119	101	114	119	117	125	108	119	116	123	105	133	116
3rd	119	106	117	119	136	115	115	124	118	123	105	133	117
4th	123	112	124	124	134	127	116	118	122	127	101	134	120
1978 1st quarter	119	104	118	119	140	116	113	122	117	127	103	146	118
2nd	120	111	119	128	138	137	114	123	123	137	115	129	124
3rd								127					

[1] The volume figures other than for the UK are derived from the figures in table 8 and the average value indices published by the IMF converted to dollar terms. The notes on table 8 apply to this table also. In particular percentage changes have been omitted because they may be misleading.

Source: United Kingdom: Department of Trade.

Table 12 Import volume (1975 = 100)[1]

	Belgium/ Luxembourg	Denmark	France	F.R. of Germany	Ireland	Italy	Nether- lands	United Kingdom	EEC	Canada	United States	Japan	OECD
1974	107	103	108	97	111	114	105	109	106	106	114	116	108
1975	100	100	100	100	100	100	100	100	100	100	100	100	100
1976	111	121	120	116	118	115	112	106	114	107	121	109	114
1977	118	118	122	123	134	115	116	109	118	109	138	113	119
1974 1st quarter	111	115	111	94	112	119	104	107	107	105	112	120	109
2nd	109	104	109	96	117	111	104	112	106	104	114	115	107
3rd	107	99	107	99	114	117	108	110	107	108	116	116	109
4th	101	95	103	100	100	108	103	108	103	105	113	113	106
1975 1st quarter	98	92	98	96	100	96	101	102	98	101	101	100	100
2nd	97	92	95	97	93	92	96	95	96	100	92	94	96
3rd	98	101	98	101	98	101	97	102	99	98	101	101	100
4th	108	115	110	107	110	112	107	101	107	101	106	104	105
1976 1st quarter	106	114	112	109	110	115	102	101	108	106	112	102	107
2nd	109	120	117	114	115	112	109	107	113	108	118	106	111
3rd	111	124	123	118	119	110	113	108	115	107	127	113	116
4th	118	124	127	123	126	123	123	109	121	108	128	114	120
1977 1st quarter	119	119	122	120	131	117	117	110	118	110	135	115	119
2nd	116	115	119	117	127	119	113	112	116	112	140	110	118
3rd	115	120	120	123	139	104	115	108	115	107	138	112	118
4th	120	117	126	130	137	119	117	106	121	107	138	114	120
1978 1st quarter	121	115	122	125	134	106	115	116	118	102	144	115	119
2nd	116	118	123	132	153	119	117	117	122	119	150	116	124
3rd								120					

[1] The volume figures other than for the UK are derived from the value figures in table 9 and the average value indices published by the IMF converted to dollar terms. The notes to table 9 apply to this table also. In particular percentage changes have been omitted because they may be misleading.

Source: United Kingdom: Department of Trade.

British Labour Statistics: Historical Abstracts 1886-1968

This unique standard work of reference brings together all the main series of official statistics compiled by the Department of Employment and its predecessors since 1886, plus some for even earlier years. It contains 389 pages of tables and 50 pages of text and the subjects covered are wage rates, earnings, hours of work, retail prices, employment, unemployment, vacancies, family expenditure, industrial accidents, and disputes, membership of trade unions, labour costs and output per head. This will be a most valuable source-book for everyone concerned with the study and formulation of economic policies. **£7 (by post £7.86)**

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Table 13 Exports of manufactures by the main manufacturing countries [1] [4]

	Canada	United States [2] [3]	Japan	Sweden [3]	Switzerland	Belgium/ Luxembourg	France	FR of Germany [3]	Italy	Nether-lands [3]	United Kingdom [3] (seasonally adjusted)	Total [1] (seasonally adjusted)	UK share per cent
Value US $ thousand million (fob)													
1974	16.52	62.26	52.50	12.12	10.91	23.03	33.60	78.95	24.88	18.95	32.02	365.78	8.8
1975	16.68	69.46	53.17	13.84	12.04	22.80	40.12	79.62	29.14	19.32	36.58	392.78	9.3
1976	20.65	75.95	64.58	14.77	13.66	26.04	43.01	90.73	31.18	22.32	38.54	441.41	8.7
1977	23.08	78.92	77.70	15.59	16.15	29.34	49.71	104.35	38.01	23.77	46.77	503.39	9.3
1975 1st quarter	3.97	16.89	12.51	3.54	2.95	6.16	10.25	19.78	6.92	4.86	9.37	99.24	9.4
2nd	4.35	17.93	13.04	3.77	3.13	6.00	10.98	21.02	7.28	5.13	9.11	98.67	9.2
3rd	3.73	16.48	13.14	2.91	2.71	4.72	8.62	18.40	7.19	4.16	8.77	94.97	9.2
4th	4.63	18.16	14.48	3.62	3.25	5.92	10.27	20.41	7.76	5.16	9.33	99.89	9.3
1976 1st quarter	4.63	18.22	13.80	3.51	3.08	6.07	10.40	20.80	6.81	5.01	9.58	104.64	9.2
2nd	5.58	19.94	15.75	3.68	3.44	6.64	11.23	21.90	7.46	5.31	9.49	106.62	8.9
3rd	4.99	17.96	16.79	3.46	3.20	5.86	9.62	22.26	7.84	5.38	9.60	111.79	8.6
4th	5.44	19.83	18.23	4.12	3.95	7.47	11.75	25.77	9.07	6.61	9.88	118.36	8.3
1977 1st quarter	5.58 p	19.40	17.09	3.92	3.61	7.28 p	12.04 p	24.74 p	8.45 p	5.88 p	10.55	121.76 p	8.7
2nd	6.19 p	20.59	18.98	4.05	3.81	7.55 p	12.69 p	25.39 p	9.62 p	5.89 p	11.54	121.92 p	9.5
3rd	5.18 p	19.13	19.87	3.23	3.84	6.62 p	11.29 p	24.89 p	9.12 p	5.66 p	12.20	126.56 p	9.6
4th	6.13 p	19.80	21.76	4.40	4.88	7.88 p	13.69 p	29.32 p	10.82 p	6.34 p	12.49	133.15 p	9.4
1978 1st quarter	5.91 p	20.12	21.16	3.97	4.93 p	8.55 p	13.85 p	28.68	9.17 p	6.71 p	13.84		
2nd	7.26 p	23.39	22.93	4.42	5.21 p	8.63 p	15.30 p	30.42	11.60 p	6.77 p	13.48		
3rd		22.83 p						29.80			14.81		
Volume index 1975 = 100													
1974	105	104	99	106	108	109	102	112	100	108	103	105	
1975	100	100	100	100	100	100	100	100	100	100	100	100	
1976	113	102	124	102	111	115	109	114	114	116	109	112	
1977	126	101	135	102	124	119	118	119	123	113	118	117	
1975 1st quarter	92	99	89	101	93	100	102	96	93	94	100	98	
2nd	104	103	95	104	102	101	104	102	99	101	98	98	
3rd	92	95	100	88	95	87	88	95	100	91	98	99	
4th	112	103	117	107	110	112	104	108	109	115	104	105	
1976 1st quarter	102	101	113	101	103	111	106	109	105	109	105	109	
2nd	121	108	125	104	112	120	114	113	115	113	109	110	
3rd	109	97	128	96	104	104	98	111	111	113	109	112	
4th	122	104	132	106	126	125	120	122	126	128	112	115	
1977 1st quarter	118 p	102	119	99	118	121 p	118 p	116 p	114 p	114 p	113	116 p	
2nd	133 p	107	130	104	122	124 p	123 p	118 p	126 p	113 p	118	115 p	
3rd	114 p	97	136	85	119	107 p	105 p	113 p	116 p	108 p	123	117 p	
4th	137 p	98	154	119	139	125 p	125 p	128 p	135 p	118 p	117	120 p	
1978 1st quarter	124 p	99	129	102	128 p	124 p		118			118		
2nd											119		
3rd											122		

Unit value index in US $ 1975 = 100

1977 weights	0.0401	0.1487	0.1674	0.0393	0.0360	0.0616	0.1131	0.2564	0.0852	0.0524		Weighted average ex UK	Ratio of UK to weighted average
1974	94	86	99	82	84	92	82	88	85	91	86	89	96.2
1975	100	100	100	100	100	100	100	100	100	100	100	100	100.0
1976	109	107	98	104	102	99	98	100	94	99	98	101	97.8
1977	110	113	111	111	108	108	105	110	106	109	113	110	102.4
1975 1st quarter	104	98	105	101	105	108	100	104	102	107	102	103	99.5
2nd	100	100	103	105	102	104	105	104	101	105	102	103	99.1
3rd	97	100	98	96	95	95	98	97	99	95	98	98	100.3
4th	99	102	93	98	98	93	98	95	98	93	98	97	101.2
1976 1st quarter	109	104	92	100	99	96	98	96	89	95	100	97	103.2
2nd	111	106	95	102	102	97	98	97	89	97	98	99	96.8
3rd	110	107	99	104	102	99	98	101	97	99	99	101	97.8
4th	107	110	104	112	104	105	98	106	99	107	98	105	93.3
1977 1st quarter	113	110	108	114	102	106	102	107	102	107	105	107	97.9
2nd	112	111	110	112	104	107	103	108	105	108	110	108	101.6
3rd	109	114	110	110	107	109	107	111	108	109	114	110	103.3
4th	107	116	106	107	117	111	109	115	110	111	121	113	107.0
1978 1st quarter	114	117	123	113	128	121		122			132	120 p	110.0 p
2nd											129		

[1] See special note at end of text. [2] Excluding 'special category exports' for which detailed information on countries of destination is withheld by the United States authorities. [3] STC (rev 2) from 1 January 1978. p Provisional.

Sources: Values. United Kingdom and total: DTI. Other countries: OECD updated from national sources. Volume. Derived from the value figures and the unit value index numbers. Unit values United Kingdom and total: DTI. Other countries: United Nations. The weighting reflects the relative importance of each country in UK's overseas markets. The ratio indicates the UK competitive position.

United Kingdom trade in the third quarter 1978

Section 1: Recent movements in visible trade: balance of payments basis

Total trade and oil (tables 1 to 3)
In the third quarter of 1978 there was a visible trade deficit of £342 million, compared with a deficit of £182 million in the previous quarter. This worsening of £160 million was more than accounted for by an unfavourable swing of £200 million in the balance on the more erratic items of trade, mainly due to a reduction in exports of precious stones from an exceptionally high second-quarter level. There was also an increase of £117 million in the deficit on trade in oil, from an erratically low second quarter level.

Total exports were valued at £9,071 million, 4 per cent (£328 million) above the second-quarter level, despite a fall of £244 million in shipments of the more erratic items (mainly precious stones). The increase in exports was generally widespread among the major commodity groups. The value of imports was £9,413 million, 5½ per cent (£488 million) above the second-quarter level, with approximately one-third of the overall rise accounted for by an increase of £173 million in imports of oil from an erratically low level. Elsewhere imports of manufacturers rose strongly.

The deterioration in the visible balance between the second and third quarters was attributable to a fall of 2½ per cent in relative volume, as export volume increased by 2½ per cent (5 per cent excluding the more erratic items) and import volume by 5½ per cent (7 per cent excluding erratics). While the underlying movement in both export and import volume is upwards, these increases tend to overstate the trend rate of growth.

Excluding erratic items, export volume in the third quarter was 4½ per cent above its previous peak level achieved in the same quarter last year, while import volume was 3 per cent above the high first-quarter level.

In the third quarter the deficit on trade in petroleum and petroleum products increased by £117 million from the exceptionally low level in the previous quarter, with exports increasing by £56 million (10 per cent) and imports rose by £173 million (18 per cent). Exports of crude oil continued to increase in the third quarter, reaching a new record level of £338 million (8 per cent up on the previous quarter) while the further rise, of 12 per cent, in exports of petroleum products tends to confirm that the downward trend through 1977 has been reversed. Imports of both crude oil and petroleum products increased from erratically low second-quarter levels, by 21 per cent and 7½ per cent respectively. The increase in the volume of crude oil imports was 26 per cent, while there was a fall of 3½ per cent in price, reflecting the appreciation of sterling against the US dollar.

In the third quarter, the export unit value index rose by 2 per cent while the import unit

Table 1 Total trade: value, volume and unit value indices

Seasonally adjusted except unit values. Balance of payments basis

				Unit value indices (not seasonally adjusted)			Volume indices		
	Exports fob	Imports fob	Visible balance	Exports	Imports	Terms of trade [1]	Exports	Imports	Relative volume index [2]
	£m	£m	£m	1975=100	1975=100	1975=100	1975=100	1975=100	1975=100
1970	8 121	8 163	−42	51.0	42.3	120.4	80.1	82.5	97.1
1971	9 060	8 799	+261	53.9	44.3	121.7	85.4	85.7	99.6
1972	9 450	10 172	−722	56.9	46.7	121.8	85.2	95.3	89.4
1973	12 115	14 498	−2 383	64.0	59.6	107.4	97.8	108.7	90.0
1974	16 538	21 773	−5 235	81.7	87.4	93.5	104.3	109.7	95.1
1975	19 463	22 699	−3 236	100.0	100.0	100.0	100.0	100.0	100.0
1976	25 424	29 013	−3 589	120.7	121.6	99.3	109.8	105.7	103.9
1977	32 182	33 891	−1 709	142.4	141.4	100.7	118.9	107.1	111.0
1976									
1st qtr	5 654	6 204	−550	110.7	109.8	100.8	106.2	100.2	106.0
2nd	6 160	7 109	−949	116.9	118.4	98.8	109.7	106.3	103.2
3rd	6 513	7 645	−1 132	123.9	124.4	99.6	110.1	109.0	101.0
4th	7 097	8 055	−958	131.3	133.7	98.2	113.4	107.1	105.9
1977									
1st qtr	7 512	8 485	−973	135.7	137.2	98.9	115.8	109.4	105.9
2nd	7 927	8 689	−762	141.4	141.0	100.3	118.0	109.6	107.7
3rd	8 556	8 525	+31	145.2	143.7	101.0	124.4	106.6	116.7
4th	8 187	8 192	−5	147.3	143.8	102.4	117.6	102.7	114.5
1978									
1st qtr	8 380	9 022	−642	149.5	142.6	104.8	119.5	114.1	104.7
2nd	8 743	8 925	−182	153.7	147.0	104.6	122.0	110.3	110.6
3rd	9 071	9 413	−342	157.1	149.2	105.3	125.3	116.1	107.9
Percentage change Q3/Q2	+4	+5½		+2	+1½	+½	+2½	+5½	−2½

[1] Export unit value index as percentage of import unit value index. [2] Export volume index as percentage of the import volume index

Table 2 Value and volume of exports and imports excluding the more erratic items [1]

Seasonally adjusted. Balance of payments basis

	Exports fob		Imports fob		
	Value	Volume index	Value	Volume index	Relative volume index
	£m	1975=100	£m	1975=100	1975=100
1975	18 081	100.0	20 920	100.0	100.0
1976	23 382	108.9	27 056	106.9	101.9
1977	29 520	118.1	31 187	107.5	109.9
1976					
1st qtr	5 245	106.2	5 863	102.7	103.4
2nd	5 613	108.0	6 483	105.2	102.7
3rd	6 003	109.5	7 094	109.7	99.8
4th	6 521	112.2	7 616	109.9	102.1
1977					
1st qtr	6 934	115.2	7 940	111.4	103.4
2nd	7 281	117.3	7 748	106.6	110.0
3rd	7 796	122.8	7 931	108.5	113.2
4th	7 509	117.0	7 568	103.7	112.8
1978					
1st qtr	7 802	120.9	8 391	116.3	104.0
2nd	7 927	122.1	8 272	112.1	108.9
3rd	8 500	128.4	8 804	119.8	107.2
Percentage change Q3/Q2	+7	+5	+6½	+7	−1½

[1] These are defined as ships, North Sea production installations, aircraft and precious stones.

Table 3 Trade in oil

Seasonally adjusted. Balance of payments basis

		Exports			Imports				
	Balance of visible trade	Total	Crude oil [1]	Rest of division	Total	Crude oil			Rest of division
	£m fob	£m fob	£m fob	£m fob	£m fob	£m fob	Million tonnes	Average value per tonne £ fob	£m fob
1970	−486	180	8	172	666	470	100.8	4.7	196
1971	−653	216	10	206	869	664	107.3	6.2	205
1972	−660	222	21	201	882	667	104.3	6.4	215
1973	−948	344	23	321	1 292	941	113.3	8.3	351
1974	−3 425	711	29	682	4 136	3 348	110.8	30.2	788
1975	−3 111	731	30	701	3 842	3 069	86.9	35.3	773
1976	−3 973	1 172	178	994	5 145	4 089	87.0	47.0	1 056
1977	−2 804	1 965	904	1 061	4 769	3 681	68.6	53.7	1 088
1976									
1st qtr	−947	221	18	203	1 168	925	21.8	42.7	243
2nd	−968	266	24	242	1 234	962	21.1	45.8	272
3rd	−1 058	307	45	262	1 365	1 080	22.2	48.8	285
4th	−1 000	378	91	287	1 378	1 122	21.9	51.1	256
1977									
1st qtr	−800	454	163	291	1 254	1 006	19.1	53.0	248
2nd	−745	516	239	277	1 261	988	18.2	54.3	273
3rd	−602	560	300	260	1 162	880	16.2	54.3	282
4th	−657	435	202	233	1 092	807	15.1	53.2	285
1978									
1st qtr	−642	472	272	200	1 114	866	17.3	50.0	248
2nd	−398	557	312	245	955	734	14.1	52.0	221
3rd	−515	613	338	275	1 128	890	17.8	50.1	238
Percentage charge Q3/Q2		+10	+8	+12	+18	+21	+26	−3½	+7½

[1] Not seasonally adjusted.

value index increased by 1½ per cent, resulting in a marginal improvement in the terms of trade.

Area analysis (see table 4)
In the third quarter of 1978 there was an improvement of £154 million in Britain's visible trade balance with the EEC, mainly as a result of higher exports. Nevertheless the cumulative deficit with the community in the first three quarters of this year is close to that recorded in the whole of 1977 although the export/import ratio is not much below the level in 1977. There was an increase of £36 million in the deficit with the rest of western Europe – as exports fell more than imports. Excluding North Sea installations (see note 1) there would have been an improvement of about £40 million. The deficit in the year to date is well above the record annual deficit recorded in 1973.

There was a visible trade deficit of £166 million with north America in the third quarter, an improvement of £90 million from the large deficit in the previous quarter. The visible balance with other developed countries returned to deficit in the third quarter, having been in balance in the previous quarter when imports were erratically low.

In the third quarter there was a surplus of £335 million in the visible trade with the oil exporting countries, a reduction of £176 million from the previous quarter when imports were exceptionally low. The average quarterly surplus on the UK's trade with these countries this year is close to £400 million, compared with the average of just over £220 million last year and an average deficit of £550 million in 1974. The surplus on trade with the rest of the world fell in the third quarter to £164 million, as imports rose sharply after three successive quarterly falls and more than offset a recovery in exports.

Section 2: Recent movements in exports and imports: Overseas Trade Statistics basis

Exports by area (tables 6 and 7)
UK exports in the third quarter of 1978 were valued at £9,560 million, seasonally adjusted on an Overseas Trade Statistics basis, an increase of 5 per cent over the second quarter.

Among the developed countries, where deliveries rose by 4 per cent in total, exports to the EEC were valued at £3,630 million, up by 4 per cent. Taking the community countries separately, exports to West Germany increased sharply by 13 per cent mainly due to

Table 4 **Trade by area**

Seasonally adjusted. Balance of payments basis — £ million

	EEC			Rest of W. Europe			North America			Other developed countries		
	Exports	Imports	Visible balance	Exports	Imports	Visible balance	Exports	Imports	Visible balance	Exports	Imports	Visible balance
1970	2 347	2 308	+39	1 392	1 217	+175	1 221	1 709	−488	975	828	+147
1971	2 511	2 702	−191	1 519	1 404	+115	1 416	1 591	−175	1 077	856	+221
1972	2 835	3 426	−591	1 604	1 645	−41	1 553	1 635	−82	931	1 088	−157
1973	3 944	5 135	−1 191	2 055	2 338	−283	1 872	2 155	−283	1 208	1 416	−208
1974	5 581	7 623	−2 042	2 755	3 113	−358	2 260	2 963	−703	1 721	1 623	+98
1975	6 273	8 685	−2 412	3 086	3 157	−71	2 297	2 959	−662	1 847	1 862	−15
1976	9 052	11 179	−2 127	3 996	3 998	−2	3 043	3 869	−826	1 944	1 931	+13
1977	11 878	13 611	−1 733	4 868	4 623	+245	3 752	4 509	−757	2 095	2 483	−388
1976												
1st qtr	1 951	2 364	−413	826	841	−15	676	792	−116	485	430	+55
2nd	2 216	2 851	−635	985	987	−2	754	952	−198	479	433	+46
3rd	2 313	2 808	−495	1 047	1 124	−77	795	1 037	−242	496	495	+1
4th	2 572	3 156	−584	1 138	1 046	+92	818	1 088	−270	484	573	−89
1977												
1st qtr	2 753	3 265	−512	1 216	1 151	+65	867	1 128	−261	522	620	−98
2nd	2 997	3 366	−369	1 211	1 333	−122	931	1 189	−258	525	656	−131
3rd	3 093	3 488	−395	1 313	1 042	+271	1 050	1 205	−155	539	579	−40
4th	3 035	3 492	−457	1 128	1 097	+31	904	987	−83	509	628	−119
1978												
1st qtr	3 132	3 753	−621	1 066	1 208	−142	974	1 204	−230	536	702	−166
2nd	3 378	3 997	−619	1 200	1 320	−120	1 029	1 285	−256	569	569	—
3rd	3 518	3 983	−465	1 122	1 278	−156	1 071	1 237	−166	582	675	−93
Percentage change Q3/Q2	+4	−½		−6½	−3		+4	−4		+2½	+19	

Table 4 *continued* — £ million

	Oil exporting countries			Rest of world			Total – all areas		
	Exports	Imports	Visible balance	Exports	Imports	Visible balance	Exports	Imports	Visible balance
1970	474	588	−114	1 712	1 513	+199	8 121	8 163	−42
1971	580	768	−188	1 957	1 478	+479	9 060	8 799	+261
1972	633	769	−131	1 889	1 609	+280	9 450	10 172	−722
1973	790	1 120	−330	2 246	2 334	−88	12 115	14 498	−2 383
1974	1 224	3 441	−2 217	2 997	3 010	−13	16 538	21 773	−5 235
1975	2 267	2 981	−714	3 693	3 055	+638	19 463	22 699	−3 236
1976	3 170	3 867	−697	4 219	4 169	+50	25 424	29 013	−3 589
1977	4 328	3 430	+898	5 261	5 235	+26	32 182	33 891	−1 709
1976									
1st qtr	693	840	−147	1 020	905	+115	5 654	6 204	−550
2nd	748	910	−162	1 023	1 046	−23	6 160	7 109	−949
3rd	799	1 075	−276	1 042	1 058	−16	6 513	7 645	−1 132
4th	930	1 042	−112	1 134	1 160	−26	7 097	8 055	−958
1977									
1st qtr	1 007	928	+79	1 127	1 304	−177	7 512	8 485	−973
2nd	1 061	933	+128	1 274	1 295	−21	7 927	8 689	−762
3rd	1 122	828	+294	1 393	1 359	+34	8 556	8 525	+31
4th	1 138	741	+397	1 467	1 277	+190	8 187	8 192	−5
1978									
1st qtr	1 154	818	+336	1 484	1 215	+269	8 380	9 022	−642
2nd	1 203	692	+511	1 427	1 175	+252	8 743	8 925	−182
3rd	1 162	827	+335	1 555	1 391	+164	9 071	9 413	−342
Percentage change Q3/Q2	−3½	+19		+9	+18		+4	+5½	

Balance of payments

Pink book 1978

This publication, *United Kingdom Balance of Payments 1967-77*, prepared by the Central Statistical Office, is designed as a standard reference book for UK balance of payments statistics over a long run of years up to 1977. In addition to summary tables showing the general balance of payments for the United Kingdom, it contains 14 sections of tables each with comprehensive notes and definitions. Some of these expand the detail for individual sectors of the accounts; others deal with associated areas such as the financing of private investment and its overall effects on the balance of payments, estimating the City's overseas earnings, etc.

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increases in beverages and tobacco and fuels. Deliveries to the Netherlands also rose strongly – by 11 per cent – following a similar increase in the second quarter with exports of fuels in the latest period more than doubling and offsetting falls in exports of manufactured goods. Deliveries to France and the Irish Republic increased by 9½ and 6½ per cent, respectively. Exports to Italy rose by 3½ per cent with small increases in most commodities. Shipments to Belgium/Luxembourg fell by 4½ per cent mainly reductions in exports of semi-manufactures and machinery and transport equipment, while exports to Denmark fell by 4 per cent.

UK exports to the rest of western Europe rose by 4 per cent in the third quarter to £1,449 million. Deliveries to both Spain and Sweden rose by 8 per cent. There were increased exports of fuels to Sweden but shipments of manufactured goods fell. Exports to Switzerland rose by 6½ per cent, due mainly to increases in miscellaneous articles and precious stones. In contrast, shipments to Finland fell by 14 per cent, with reductions in the value of exports of machinery and transport equipment, and shipments to Norway by 8 per cent mainly due to falls in deliveries of manufactures, particularly ships and boats.

Shipments to north America were valued at £1,092 million an increase of 4 per cent on the previous quarter. Deliveries to the United States rose by 4½ per cent with precious stones, whisky and miscellaneous manufactured articles showing major increases. Shipments to Canada rose by 1 per cent; the level of deliveries has changed little in the past five quarters. A slight decrease in manufactures in the latest quarter was balanced by rises in other commodities.

UK deliveries to the other developed countries, in aggregate, increased by 1½ per cent to £592 million. Shipments to Japan were up by 14 per cent following a broadly flat trend in the previous four periods with a rise in the value of shipments of finished manufactures, particularly aircraft engines and passenger motor cars. Exports to New Zealand rose by 15 per cent with the increase widespread amongst most of the commodities. Deliveries to Australia were up by 1½ per cent, while to South Africa they remained unchanged from the previous quarter.

The rise of 4 per cent in exports to the developing countries took the value of deliveries in the third quarter to £2,493 million. Within this group, shipments to the oil exporting countries, at £1,190 million, were down 3½ per cent, and were close to the first quarter level. Shipments to Iran fell again, by 5½ per cent, but exports to Saudi Arabia rose by 2 per cent, reversing the fall in the second quarter. Exports to Nigeria fell by 10 per cent, but were still above the first quarter level. Outside the oil exporting countries, exports to Brazil fell by 16 per cent, with decreases in machinery and transport equipment offsetting a strong rise in exports of fuel. Deliveries to Israel rose by 8 per cent despite a slowing down in exports of precious stones and machinery and transport equipment. Exports to India more than recovered the second quarter fall with a 35 per cent rise, due mainly to increased deliveries of precious stones and basic materials.

Exports to the centrally planned economies fell by 5 per cent to £243 million. Exports to the Soviet Union were down by 17 per cent with falls in most commodities. Shipments to Poland – down 17 per cent – almost reversed the second quarter's rise but levels this year remain above those in 1977.

Exports by commodity (tables 8 to 12)

Exports of manufactured goods in the third quarter of 1978 accounted for 80 per cent of total exports, and at £7,668 million, seasonally adjusted on an Overseas Trade Statistics basis, rose by 4½ per cent in value and 3 per cent in volume by comparison with the previous quarter. Excluding the more erratic items, value rose by 7 per cent and volume by 5 per cent.

Machinery exports, at £2,352 million, were 3½ per cent higher in value in the third quarter, with a marginal increase in volume. Among the machinery items, there was a further strong increase in the value of exports of office machinery (16 per cent), reflecting higher value of shipments to West Germany and Italy, and in metal-working machinery (11 per cent) with an increase in deliveries to the United States. Power-generating machinery exports were up by 10 per cent, with higher deliveries to the United States and Japan. In contrast, telecommunication equipment exports fell back by 7 per cent, specialised machinery exports were 1 per cent down and deliveries of other electrical machinery were little changed. Exports of road vehicles were 5 per cent lower in value and 4½ per cent in volume after the comparatively large increases in the second quarter of this year. Exports of other transport equipment were 9½ per cent lower than in the previous quarter.

The value of chemical exports rose by 4 per cent to £1,076 million in the third quarter of this year, with volume up by 3 per cent. Within this category, organic chemicals rose by 7 per cent in value. Inorganic chemicals were up by

Table 5 Derivation of visible trade figures

Seasonally adjusted — £ million

	Exports			Imports				
	Overseas trade statistics basis fob	Valuation and coverage adjustments	Balance of payments basis fob	Overseas trade statistics basis cif	Freight insurance and other valuation adjustments	Coverage adjustments	Balance of payments basis fob	Visible balance
1970	8 170	−49	8 121	9 163	−884	−116	8 163	−42
1971	9 289	−229	9 060	9 980	−979	−202	8 799	+261
1972	9 906	−456	9 450	11 301	−1 012	−117	10 172	−722
1973	12 657	−542	12 115	16 067	−1 326	−243	14 498	−2 383
1974	16 280	−282	16 538	23 492	−1 543	−176	21 773	−5 235
1975	20 111	−648	19 463	24 423	−1 470	−254	22 699	−3 236
1976	26 024	−600	25 424	31 569	−1 926	−630	29 013	−3 589
1977	33 308	−1 126	32 182	36 996	−2 107	−998	33 891	−1 709
1976								
1st qtr	5 784	−130	5 654	6 763	−417	−142	6 204	−550
2nd	6 303	−143	6 160	7 753	−478	−166	7 109	−949
3rd	6 617	−104	6 513	8 208	−513	−50	7 645	−1 132
4th	7 320	−223	7 097	8 845	−518	−272	8 055	−958
1977								
1st qtr	7 716	−204	7 512	9 169	−563	−121	8 485	−973
2nd	8 272	−345	7 927	9 601	−576	−336	8 689	−762
3rd	8 829	−273	8 556	9 239	−511	−203	8 525	+31
4ht	8 491	−304	8 187	8 987	−457	−338	8 192	−5
1978								
1st qtr	8 854	−474	8 380	9 870	−531	−317	9 022	−642
2nd	9 097	−354	8 743	10 221	−543	−753	8 925	−182
3rd	9 560	−489	9 071	10 471	−582	−476	9 413	−342
Percentage change Q3/Q2	+5		+4	+2½			+5½	

Table 6 Exports by area (summary)

Seasonally adjusted values. Overseas Trade Statistics basis — £ million fob

		Developed countries					Developing countries			
	Total	Total	EEC	Rest of W. Europe	North America	Other	Total	Oil exporting countries	Other	Centrally planned economies
1970	8 170	5 981	2 406	1 373	1 242	961	1 843	472	1 371	308
1971	9 289	6 752	2 722	1 520	1 447	1 064	2 218	585	1 633	285
1972	9 906	7 329	2 999	1 769	1 610	950	2 228	650	1 578	320
1973	12 657	9 572	4 106	2 293	1 954	1 220	2 628	809	1 819	413
1974	16 820	12 563	5 598	2 980	2 285	1 699	3 678	1 231	2 448	518
1975	20 111	14 125	6 490	3 385	2 370	1 880	5 260	2 292	2 968	667
1976	26 024	18 612	9 249	4 298	3 116	1 949	6 630	3 221	3 409	726
1977	33 308	23 689	12 128	5 594	3 863	2 104	8 613	4 368	4 245	910
1976										
1st qtr	5 784	4 073	1 983	908	693	490	1 514	702	812	180
2nd	6 303	4 569	2 261	1 053	776	479	1 582	752	829	183
3rd	6 617	4 762	2 369	1 090	810	492	1 641	800	842	178
4th	7 320	5 208	2 636	1 247	837	488	1 893	967	926	186
1977										
1st qtr	7 716	5 539	2 813	1 300	902	525	1 925	1 026	899	207
2nd	8 272	5 972	3 044	1 446	957	525	2 103	1 074	1 029	245
3rd	8 829	6 290	3 161	1 506	1 083	541	2 213	1 132	1 081	258
4th	8 491	5 888	3 110	1 342	922	513	2 372	1 135	1 236	200
1978										
1st qtr	8 854	6 145	3 248	1 352	997	548	2 382	1 185	1 197	293
2nd	9 097	6 506	3 484	1 390	1 048	583	2 400	1 232	1 167	256
3rd	9 560	6 762	3 630	1 449	1 092	592	2 493	1 190	1 303	243
Percentage change Q3/Q2	+5	+4	+4	+4	+4	+1½	+4	−3½	+12	−5

1½ per cent and plastic exports were virtually unchanged with in both cases the levels this year generally little different from last year. Medicinal and pharmaceutical products increased in value by 2 per cent.

Deliveries of metal and miscellaneous metal manufactures increased in value by 3½ per cent to £787 million, although volume was unchanged. Non-ferrous metals exports increased by 9½ per cent in value following the fall in the second quarter. There were higher value shipments to Belgium and Luxembourg, France, the Irish Republic and the United States. Iron and steel exports was unchanged in value following the sharp increases in the second quarter. Exports of textiles, at £311 million, were 5 per cent higher in value than in the previous quarter, with volume up by 3½ per cent reflecting increased deliveries to Japan and the oil exporting countries.

The value of exports of other manufactured goods, which includes precious stones, rose 5½ per cent in value and 6 per cent in volume. Excluding precious stones, both value and volume more than made good falls in the previous quarter rising by 14 per cent and 11 per cent respectively. Exports of professional and scientific instruments increased by 5 per cent in value, continuing the strongly rising trend of deliveries of this commodity over the past 18 months. Exports of clothing and footwear changed very little in value compared with the second quarter of this year having remained broadly flat since the third quarter last year.

Within the broad category of non-manufactured goods, exports of food, beverages and tobacco rose by 2 per cent to £744 million but fell 2 per cent in volume. Deliveries of beverages and tobacco rose strongly by 14 per cent in value reflecting increased exports to most of Britain's markets, particularly West Germany. Exports of whisky to Spain doubled compared with the previous quarter, while the value of shipments to the United States market continued to rise.

Shipments of food and live animals fell by 4½ per cent in value, with a sharp fall in exports to Poland and the Soviet Union, but a small rise in deliveries to the EEC.

Basic material exports rose by 5½ per cent in value (to £256 million) and 2½ per cent in volume, following sharp rises in the second quarter of this year.

Fuel exports rose by 9 per cent to £647 million in value, and volume increased by 11 per cent. Deliveries of crude oil rose to Belgium and Luxembourg, the Netherlands and West Germany, but were lower to the United States compared with the last quarter.

Imports by area (tables 13 and 14)
(The comparisons for some of the component

Table 7 Exports by area (detail)

Seasonally adjusted values. Overseas Trade Statistics basis

£ million fob

	1977			1978		Percentage change
	Year	3rd qtr	4th qtr	1st qtr	2nd qtr	3rd qtr	Q3/Q2
Developed countries	23 689	6 290	5 888	6 145	6 506	6 762	+4
EEC	12 128	3 161	3 110	3 248	3 484	3 630	+4
Belgium and Luxembourg	1 841	460	480	539	570	543	−4½
Denmark	800	206	203	213	207	198	−4
France	2 162	563	590	583	609	666	+9½
Irish Republic	1 650	444	451	455	502	536	+6½
Italy	983	239	245	268	273	282	+3½
Netherlands	2 173	552	484	497	554	617	+11
West Germany	2 518	702	658	716	730	828	+13
Rest of W. Europe	5 594	1 506	1 342	1 352	1 390	1 449	+4
Finland	347	92	84	90	87	75	−14
Norway	767	318	162	170	178	163	−8½
Spain	471	108	127	102	113	122	+8
Sweden	1 201	308	273	278	281	303	+8
Switzerland	1 437	300	363	455	458	486	+6½
North America	3 863	1 083	922	997	1 048	1 092	+4
United States	3 127	891	733	815	859	898	+4½
Canada	713	183	185	177	183	185	+1
Other	2 104	541	513	548	583	592	+1½
Australia	761	194	181	200	213	216	+1½
Japan	470	121	128	124	126	144	+14
New Zealand	289	82	65	69	63	72	+15
South Africa	584	162	136	157	173	173	—
Developing countries	8 613	2 213	2 372	2 382	2 400	2 493	+4
Latin America	971	301	271	239	235	257	+9½
Middle East and north Africa	3 863	998	1 044	1 057	1 040	1 053	+1½
Iran	655	151	185	191	187	177	−5½
Israel	276	71	85	64	58	63	+8
Saudi Arabia	601	152	162	190	186	190	+2
Rest	3 779	914	1 057	1 086	1 125	1 183	+5
Brazil	246	69	89	57	61	52	−16
India	278	67	75	86	67	90	+35
Nigeria	1 079	276	283	281	326	292	−10
Centrally planned economies	910	258	200	293	256	243	−5
Poland	200	47	47	61	71	62	−12
Soviet Union	347	124	73	137	104	87	−17
Total	33 308	8 829	8 491	8 854	9 097	9 560	+5
of which							
Oil-exporting countries	4 368	1 132	1 135	1 185	1 232	1 190	−3½

Table 8 Exports by commodity (summary)

Seasonally adjusted values. Overseas Trade Statistics basis

£ million fob

					Manufactures [2]									
						Machinery and transport equipment [2]								
	Total	Food, beverages and tobacco	Basic materials	Fuels	Total	Total	Machinery	Road vehicles	Other transport equipment [1] [2]	Chemicals	Metals	Textiles	Other manufactures	Miscellaneous
SITC (Rev 2)		0+1	2+4	3	5-8	7	71-77	78	79	5	67-69	65	Rest of 6+8	9
1970	8 170	514	253	210	6 913	3 411	2 236	874	302	775	962	418	1 347	280
1971	9 289	588	263	239	7 936	4 007	2 624	1 036	348	873	1 007	444	1 605	263
1972	9 906	660	302	242	8 418	4 206	2 753	971	482	951	1 018	468	1 775	285
1973	12 657	876	397	374	10 638	4 981	3 270	1 169	542	1 257	1 313	629	2 458	373
1974	16 820	1 063	552	782	13 907	6 322	4 256	1 398	669	2 113	1 718	774	2 980	515
1975	20 111	1 428	530	827	16 655	8 431	5 782	1 854	795	2 145	1 849	729	3 501	672
1976	26 024	1 692	735	1 265	21 616	10 383	6 994	2 377	1 012	3 007	2 362	972	4 892	715
1977	33 308	2 217	895	2 078	27 172	12 680	8 337	2 871	1 473	3 821	2 879	1 193	5 590	945
1976														
1st qtr	5 784	393	150	244	4 809	2 373	1 639	542	192	655	489	209	1 076	175
2nd	6 303	409	174	290	5 262	2 573	1 707	588	278	725	570	231	1 194	171
3rd	6 617	423	190	327	5 525	2 562	1 737	604	221	781	638	252	1 229	184
4th	7 320	469	221	403	6 019	2 874	1 910	644	320	846	665	280	1 393	186
1977														
1st qtr	7 716	494	228	482	6 263	2 863	1 925	669	270	879	699	298	1 543	214
2nd	8 272	539	218	547	6 754	3 105	2 063	723	319	946	751	295	1 693	243
3rd	8 829	591	232	588	7 189	3 394	2 128	736	530	1 029	742	309	1 634	244
4th	8 491	593	218	462	6 966	3 318	2 221	744	354	967	688	292	1 730	244
1978														
1st qtr	8 854	699	208	504	7 178	3 320	2 195	759	366	980	738	307	1 840	232
2nd	9 097	729	243	593	7 344	3 457	2 271	805	381	1 037	759	296	1 849	244
3rd	9 560	744	256	647	7 668	3 462	2 352	766	345	1 076	787	311	1 949	253
Percentage change Q3/Q2	+5	+2	+5½	+9	+4½	—	+3½	−5	−9½	+4	+3½	+5	+5½	+4

[1] Not seasonally adjusted. [2] Includes North Sea installations.

Table 9 Exports by commodity (detail)

Seasonally adjusted values. Overseas trade statistics basis

£ million fob

	1977				1978			
	year	2nd qtr	3rd qtr	4th qtr	1st qtr	2nd qtr	3rd qtr	Percentage change Q3/Q2
Food, beverages and tobacco	2 217	539	591	593	699	729	744	+2
Food and live animals	1 418	349	368	396	475	477	456	−4½
Beverages and tobacco	799	190	223	197	224	252	288	+14
Beverages	629	153	179	149	175	199	213	+7
Basic materials	895	218	232	218	208	243	256	+5½
Crude materials	838	207	214	203	196	231	239	+3½
Textile fibres	269	66	66	65	57	69	73	+7
Fuels	2 078	547	588	462	504	593	647	+9
Manufactures	27 172	6 754	7 189	6 966	7 178	7 344	7 668	+4½
Machinery and transport equipment	12 680	3 105	3 394	3 318	3 320	3 457	3 462	—
Machinery	8 337	2 063	2 128	2 221	2 195	2 271	2 352	+3½
Power generating machinery	1 527	358	409	402	421	433	476	+10
Specialised machinery	2 037	520	499	550	548	540	533	−1
Metal working machinery	325	81	84	84	90	91	101	+11
General industrial machinery	1 642	408	411	437	441	457	463	+1½
Office machinery	761	188	204	191	189	210	244	+16
Telecommunications equipment etc	713	179	176	198	178	195	181	−7
Other electrical machinery	1 332	334	350	340	333	354	356	+½
Road vehicles	2 871	723	736	744	759	805	766	−5
Other transport equipment [1]	1 473	319	530	354	366	381	345	−9½
Chemicals	3 821	946	1 029	967	980	1 037	1 076	+4
Organic chemicals	832	195	215	213	224	216	231	+7
Inorganic chemicals	524	143	159	123	125	142	144	+1½
Medicinal and pharmaceutical products	555	132	149	148	160	163	166	+2
Plastics	619	158	161	153	151	161	162	+½
Metals	2 879	751	742	688	738	759	787	+3½
Iron and steel	1 017	277	261	231	249	276	277	—
Non-ferrous metals	818	209	207	188	204	189	207	+9½
Miscellaneous metal manufactures	1 045	260	262	283	287	288	293	+1½
Textiles	1 193	295	309	292	307	296	311	+5
Other	6 595	1 693	1 634	1 730	1 840	1 849	1 949	+5½
Clothing and footwear	701	171	181	193	189	191	189	−½
Instruments	925	217	241	250	249	267	281	+5
Miscellaneous	945	243	244	244	232	244	253	+4
Total	33 308	8 272	8 829	8 491	8 854	9 097	9 560	+5

[1] Not seasonally adjusted.

series are affected by the inclusion in the second quarter of North Sea oil production installations valued at around £500 million on an Overseas Trade Statistics basis – see note 1.)

In the third quarter of 1978 the value of imports was £10,471 million, seasonally adjusted on an Overseas Trade Statistics basis, 2½ per cent higher than in the previous quarter.

During this period, deliveries from the developed countries were 3 per cent lower although excluding North Sea installations there was a rise of 3 per cent. The value of imports from the EEC, at £4,161 million, rose by 1 per cent. Among the individual member countries, imports from the Irish Republic rose by 2½ per cent, with an increase in deliveries of cattle and petroleum products outweighing a fall in arrivals of textile yarns and office machines.

Arrivals from France which had been broadly unchanged in the previous four quarters were sharply higher (15 per cent), with increased shipments of inorganic chemicals, crude oil and wine offsetting a fall in sugar imports. The 2 per cent increase in deliveries from Italy reflected a rise in shipments of clothing which outweighed a fall in arrivals of motor cars. Imports from Denmark fell by 10 per cent with reduced arrivals of bacon, butter and cheese contributing. Imports from West Germany which had increased sharply in the second quarter and from Belgium and Luxembourg both rose by 2½ per cent while arrivals from the Netherlands were unchanged.

At £1,704 million, imports from the rest of western Europe were 16 per cent lower than in the previous quarter – this was attributable to the arrival of North Sea installations in May and June. Excluding these installations, deliveries from this area rose by 11 per cent in the third quarter. Deliveries from Sweden fell by 2½ per cent mainly the result of lower arrivals of motor cars. Imports from Norway fell

Table 10 Exports by commodity: volume indices

Seasonally adjusted. Overseas trade statistics basis

Indices 1975=100

					Manufactures [1]							
						Machinery and transport Equipment [1] [2]						
	Total	Food, beverages and tobacco	Basic materials	Fuels	Total	Machinery	vehicles	Road Chemicals	Metals	Textiles	factures	Other manu-
SITC (rev 2)		0+1	2+4	3	5-8	7	71-77	78	5	67-69	65	Rest of 6+8
Weights	1 000	71	26	41	828	419	287	92	107	92	36	174
1970	77.9	65	92	110	77	75	73	84	73	97	96	70
1971	84.7	71	93	110	85	83	81	90	80	104	101	80
1972	86.4	74	100	112	86	82	80	81	85	105	107	84
1973	98.5	88	105	117	99	91	89	90	103	120	124	98
1974	102.6	91	110	109	103	95	95	94	122	112	118	104
1975	100.0	100	100	100	100	100	100	100	100	100	100	100
1976	108.7	103	117	120	109	101	99	104	124	109	117	117
1977	119.0	111	125	164	118	105	102	105	141	116	120	135
1976												
1st qtr	105.1	103	108	103	105	100	101	105	116	99	109	112
2nd	108.4	101	115	115	109	103	100	107	125	111	116	116
3rd	108.2	103	116	122	109	97	97	102	127	113	119	116
4th	113.0	107	129	139	112	104	101	103	129	111	122	124
1977												
1st qtr	115.1	108	131	155	113	100	98	103	131	115	124	133
2nd	118.7	109	118	170	118	105	102	106	141	121	120	136
3rd	123.9	114	130	183	123	110	103	105	150	120	122	131
4th	118.1	115	121	149	117	105	104	105	142	109	112	138
1978												
1st qtr	121.9	137	120	176	118	103	100	107	144	115	119	142
2nd	122.7	134	141	205	119	108	102	120	154	118	113	131
3rd	127.1	132	145	228	122	105	102	115	158	117	117	139
Percentage change Q3/Q2	+3½	−2	+2½	+11	+3	−2	+½	−4½	+3	−½	+3½	+6

[1] Includes North Sea installations. [2] Indices for other transport equipment SITC (rev 2) 79 are not separately available.

by 71 per cent reflecting the arrival of major North Sea installations in the previous quarter. Excluding these installations, imports from this source were down by 13 per cent as a result of a fall in deliveries of crude oil. A large rise in deliveries of precious stones contributed to the 52 per cent increase in imports from Switzerland. Imports from Finland rose by 7 per cent.

Deliveries from north America fell by 3½ per cent in the third quarter to £1,337 million. The fall was mainly attributable to an 11 per cent decline in arrivals from Canada to their lowest level since the first quarter of 1976 with reduced deliveries of inorganic chemicals, zinc, copper and nickel. Imports from the United States fell by 1½ per cent, with a fall in shipments of organic and inorganic chemicals and general industrial machinery outweighing a rise in deliveries of tobacco.

Imports from the other developed countries which had declined in the second quarter rose by 14 per cent to £759 million. Deliveries from Australia were up by 44 per cent to be above the first quarter level with increased arrivals of coal, meat and iron ore contributing. Ship-

Table 11 Exports: value and volume indices excluding the more erratic items

Seasonally adjusted. Overseas Trade Statistics basis

	Total [1]		Manufactures					
			Total [1]		Machinery and transport equipment [2]		Other manufactures [3]	
	Value	Volume	Value	Volume	Value	Volume	Value	Volume
	£m	1975=100	£m	1975=100	£m	1975=100	£m	1975=100
1975	18 480	100.0	15 024	100	7 662	100	2 640	100
1976	23 705	108.1	19 297	108	9 407	101	3 549	115
1977	29 852	116.8	23 717	115	11 245	102	4 578	126
1976								
1st qtr	5 321	105.4	4 346	106	2 193	102	793	111
2nd	5 685	107.0	4 644	108	2 309	102	841	111
3rd	6 087	108.6	4 996	110	2 352	98	909	116
4th	6 612	111.3	5 311	110	2 553	101	1 006	121
1977								
1st qtr	7 008	113.9	5 555	112	2 595	99	1 102	129
2nd	7 356	116.0	5 837	114	2 792	103	1 090	123
3rd	7 889	121.5	6 249	120	2 885	104	1 203	132
4th	7 600	115.9	6 075	115	2 974	104	1 184	129
1978								
1st qtr	7 935	120.2	6 259	116	2 966	102	1 275	136
2nd	8 076	121.6	6 322	117	3 090	107	1 195	125
3rd	8 652	127.8	6 759	123	3 142	106	1 361	139
Percentage change Q3/Q2	+7	+5	+7	+5	+1½	−1	+14	+11

[1] As in table 8 but excluding ships, North Sea production installations, aircraft and precious stones. [2] As in table 8 but excluding ships, North Sea production installations and aircraft. [3] As in table 8 but excluding precious stones.

Table 12 Exports by commodity: unit value indices

Not seasonally adjusted. Overseas Trade Statistics basis

Indices 1975=100

					Manufactures							
						Machinery and transport equipment [1]						
	Total	Food, beverages and tobacco	Basic materials	Fuels	Total	Total	Machinery	Road vehicles	Chemicals	Metals	Textiles	Other manufactures
SITC (rev 2)		0+1	2+4	3	5-8	7	71-77	78	5	67-69	65	Rest of 6+8
1970	51.1	56	51	23	53	52	52	53	48	52	57	56
1971	54.0	59	53	26	55	56	55	59	50	51	58	58
1972	57.0	63	58	26	58	60	60	62	51	52	58	62
1973	64.1	70	72	38	65	65	64	67	56	60	69	72
1974	81.8	83	93	87	81	79	78	79	81	85	90	82
1975	100.0	100	100	100	100	100	100	100	100	100	100	100
1976	120.8	115	124	126	121	123	123	123	114	119	115	124
1977	142.5	137	144	150	143	149	148	152	128	136	139	142
1976												
1st qtr	110.7	107	107	115	111	113	113	110	106	110	105	113
2nd	117.1	113	119	122	117	119	119	119	109	113	110	121
3rd	124.0	117	132	129	124	126	126	128	116	124	117	127
4th	131.4	125	138	138	132	133	133	136	123	131	127	135
1977												
1st qtr	135.9	130	142	145	136	139	139	142	126	133	133	135
2nd	141.7	138	151	150	142	146	145	150	128	137	137	143
3rd	145.3	142	145	154	145	152	151	156	129	136	142	145
4th	147.2	139	138	150	148	158	156	161	130	137	145	143
1978												
1st qtr	149.5	143	135	141	151	161	159	161	129	142	145	148
2nd	153.7	148	141	140	155	162	162	159	131	145	147	162
3rd	157.3	152	142	138	159	168	167	168	132	150	149	162
Percentage change Q3/Q2	+2½	+3	+½	−1½	+2½	+3½	+3	+6	+1½	+4	+1½	–

[1]Indices for other transport equipment SITC (rev 2) 79 are not separately available.

Table 13 Imports by area (summary)

Seasonally adjusted values. Overseas Trade Statistics basis

£ million cif

		Developed countries					Developing countries			
	Total	Total	EEC	Rest of W. Europe	North America	Other	Total	Oil exporting countries	Other	Centrally planned economies
1970	9 163	6 549	2 485	1 323	1 878	864	2 203	833	1 370	389
1971	9 980	7 164	2 985	1 479	1 752	947	2 420	1 069	1 351	376
1972	11 301	8 379	3 586	1 845	1 807	1 142	2 469	1 040	1 429	432
1973	16 067	11 885	5 291	2 735	2 394	1 465	3 563	1 507	2 056	595
1974	23 492	16 241	7 799	3 491	3 269	1 683	6 485	3 815	2 670	744
1975	24 423	17 625	8 876	3 594	3 238	1 917	6 022	3 288	2 734	738
1976	31 569	22 569	11 510	4 645	4 280	2 134	7 860	4 296	3 564	1 109
1977	36 996	27 420	14 161	5 582	4 997	2 680	8 167	3 804	4 362	1 357
1976										
1st qtr	6 763	4 788	2 458	1 001	877	451	1 682	924	759	254
2nd	7 753	5 633	2 953	1 116	1 060	503	1 883	999	884	301
3rd	8 208	5 780	2 835	1 247	1 134	564	2 100	1 177	923	270
4th	8 845	6 369	3 264	1 280	1 209	616	2 195	1 196	999	284
1977										
1st qtr	9 169	6 608	3 380	1 300	1 259	668	2 157	1 032	1 125	302
2nd	9 601	7 212	3 551	1 647	1 309	705	2 117	1 030	1 087	342
3rd	9 239	6 767	3 601	1 218	1 328	620	2 065	924	1 141	371
4th	8 987	6 833	3 629	1 416	1 101	687	1 828	819	1 009	342
1978										
1st qtr	9 870	7 463	3 874	1 553	1 307	728	1 975	925	1 050	310
2nd	10 221	8 207	4 123	2 029	1 387	668	1 814	779	1 035	313
3rd	10 471	7 960	4 161	1 704	1 337	759	2 167	960	1 206	322
Percentage change Q3/Q2	+2½	−3	+1	−16	−3½	+14	+19	+23	+17	+3

ments from South Africa rose by 7½ per cent, the result of higher deliveries of precious stones. Imports from Japan were up by 6 per cent with an increase in shipments of radios and television sets. There was a 25 per cent increase in arrivals from New Zealand following a fall in the previous quarter.

Imports from the developing countries, at £2,167 million, rose by 19 per cent. Within this total, arrivals from the oil exporting countries rose by 23 per cent from the low second quarter level. There was an increase of 33 per cent in shipments from the Middle East and north Africa largely reflecting higher imports of crude oil from Saudi Arabia (total imports 67 per cent higher), Iran (total imports 39 per cent higher) and Kuwait (total imports 17 per cent higher).

Among imports from the rest of the developing countries, which in total rose by 10 per cent, there was a 38 per cent fall in arrivals from Nigeria (from a high second quarter level), largely the result of reduced crude oil deliveries.

Imports from the centrally planned economies rose by 3 per cent, with an increase of 30 per cent in deliveries from the Soviet Union from a somewhat low second quarter level.

Imports by commodity (see table 15 to 19) Imports of food, beverages and tobacco, at £1,595 million, rose by 2 per cent in value, reflecting a 3 per cent rise in volume. In value terms, arrivals of food and live animals rose marginally with a small increase in both volume and price. Shipments of dairy produce fell markedly by 54 per cent in value, mainly reflecting lower volumes. In terms of value, imports of meat rose by 6½ per cent, with an increase in both volume and price. Deliveries of cereals and animal feeding stuffs, and of fruit and vegetables rose in value by 12 per cent and 8 per cent, respectively, mainly attributable to higher volumes.

Tobacco imports rose by 21 per cent and arrivals of beverages by 16 per cent – both reflecting large increases in volume. Fuel deliveries increased by 17 per cent in value, from an erratically low second quarter level, to £1,256 million, with an 18 per cent rise in volume outweighing a small fall in price. Imports of industrial materials, at £3,891 million, rose by 10 per cent in value and 7½ per cent in volume excluding precious stones the increases were 6 per cent and 5½ per cent, respectively. Within this group, imports of basic materials rose by 2½ per cent reflecting a rise in both volume and price. Imports of most of the constituent commodities had been in broad decline over the past year. There was a further fall, of 1 per cent, in the value of crude material imports. Arrivals of timber fell by 10 per cent in value, mainly the result of lower volumes. Imports of metal ores rose by 4½ per cent in value with higher volumes offsetting reduced prices. Shipments of textile fibres fell by 1½ per cent in value, with a 7 per cent fall in volume outweighing a similar increase in price. Imports of pulp and waste paper fell by 3 per cent in value mainly reflecting reduced

Table 14 Imports by area (detail)

Seasonally adjusted values. Overseas Trade Statistics basis

£ million cif

	1977				1978			Percentage change
	Year	2nd qtr	3rd qtr	4th qtr	1st qtr	2nd qtr	3rd qtr	Q3/Q2
Developed countries	27 420	7 212	6 767	6 823	7 463	8 207	7 960	−3
EEC	14 161	3 551	3 601	3 629	3 874	4 123	4 161	+1
Belgium and Luxembourg	1 686	429	420	438	452	452	463	+2½
Denmark	816	210	205	199	243	249	225	−10
France	2 689	651	726	720	721	735	845	+15
Irish Republic	1 295	312	351	321	396	395	405	+2½
Italy	1 543	385	395	407	455	463	473	+2
Netherlands	2 530	645	592	610	622	630	631	–
West Germany	3 602	859	947	959	994	1 139	1 168	+2½
Rest of W. Europe	5 582	1 647	1 218	1 416	1 553	2 029	1 704	−16
Finland	595	159	144	142	151	155	165	+7
Norway [1]	853	405	140	171	222	752	220	−71
Sweden	1 270	317	310	322	320	341	332	−2½
Switzerland	1 333	382	277	381	550	427	649	+52
North America	4 997	1 309	1 328	1 101	1 307	1 387	1 337	−3½
United States	3 729	1 007	991	809	1 015	1 091	1 075	−1½
Canada	1 230	294	322	282	287	287	257	−11
Other	2 680	705	620	687	728	668	759	+14
Australia	346	95	83	74	97	71	103	+44
Japan	1 065	275	267	262	319	321	340	+6
New Zealand	384	91	100	96	107	89	111	+25
South Africa	885	259	177	249	186	210	227	+7½
Developing countries	8 167	2 117	2 065	1 828	1 975	1 814	2 167	+19
Latin America	769	192	186	175	178	202	218	+8
Middle East and north Africa	3 942	1 077	964	864	962	762	1 012	+33
Iran	792	211	146	157	182	101	140	+39
Kuwait	555	157	146	106	214	143	168	+17
Saudi Arabia	1 133	317	271	271	250	155	258	+67
Rest	3 456	848	915	788	835	850	937	+10
Nigeria	237	46	56	45	62	107	67	−38
Centrally planned economies	1 357	342	371	342	310	313	322	+3
Soviet Union	781	193	228	174	171	146	190	+30
Total	36 996	9 601	9 239	8 987	9 870	10 221	10 471	+2½
of which								
Oil exporting countries	3 804	1 030	924	819	925	779	960	+23

[1] From January 1978, continental shelf (foreign part) previously included in rest of western Europe has been re-allocated to the appropriate parent country in the Overseas Trade Statistics. It has not been possible to compile figures on this new basis for earlier periods. While any discontinuity at the level of the broad area groups is likely to be comparatively small, at the country level it has a greater effect and is the main explanation of the sharp rise in imports from Norway in the first quarter of 1978.

Table 15 Imports by commodity (summary)

Seasonally adjusted values. Overseas Trade Statistics basis

£ million cif

				Industrial materials				Finished manufactures [1]						
									Machinery and transport equipment [1]					
	Total	Food, beverages and tobacco	Fuels	Total	Basic materials	Chemicals	Other semi-manufactures	Total	Total	Machinery	Road vehicles	Other transport equipment [1] [2]	Other	Miscellaneous
SITC (rev 2)		0+1	3	2, 4, 5, 6	2+4	5	6	7+8	7	71-77	78	79	8	9
1970	9 163	2 047	950	3 859	1 362	533	1 964	2 175	1 599	1 192	174	233	576	131
1971	9 980	2 176	1 253	3 840	1 278	549	2 013	2 558	1 860	1 274	283	303	698	153
1972	11 301	2 356	1 247	4 286	1 330	631	2 325	3 267	2 399	1 586	498	316	868	145
1973	16 067	3 094	1 733	6 235	1 977	862	3 396	4 798	3 506	2 414	668	424	1 291	208
1974	23 492	3 762	4 644	8 909	2 583	1 523	4 803	5 749	4 141	3 002	669	471	1 608	428
1975	24 423	4 335	4 316	8 331	2 233	1 350	4 748	6 906	5 042	3 338	910	794	1 864	535
1976	31 569	4 983	5 669	11 245	3 248	1 924	6 073	9 225	6 755	4 305	1 432	1 019	2 470	447
1977	36 996	5 945	5 252	13 491	3 612	2 365	7 513	11 803	8 780	5 298	2 133	1 349	3 023	505
1976														
1st qtr	6 763	1 081	1 282	2 409	678	413	1 319	1 855	1 310	899	271	141	544	103
2nd	7 763	1 081	1 381	2 706	768	472	1 466	2 336	1 745	1 026	333	386	591	117
3rd	8 208	1 261	1 491	2 910	872	497	1 541	2 390	1 754	1 122	391	240	636	117
4th	8 845	1 396	1 514	3 221	930	543	1 747	2 645	1 946	1 257	437	251	699	110
1977														
1st qtr	9 169	1 502	1 375	3 358	981	604	1 773	2 739	1 995	1 285	485	225	744	119
2nd	9 601	1 561	1 377	3 462	888	593	1 981	3 086	2 346	1 297	496	553	741	122
3rd	9 239	1 547	1 278	3 324	897	599	1 828	2 964	2 204	1 369	555	280	760	141
4th	8 987	1 336	1 223	3 346	847	569	1 931	3 014	2 236	1 347	598	291	778	123
1978														
1st qtr	9 870	1 521	1 267	3 606	845	653	2 108	3 268	2 416	1 442	669	305	852	119
2nd	10 221	1 562	1 078	3 542	809	673	2 060	3 950	3 042	1 569	710	762	908	133
3rd	10 471	1 595	1 256	3 891	829	677	2 385	3 567	2 572	1 612	734	226	995	187
Percentage change Q3/Q2	+2½	+2	+17	+10	+2½	+½	+16	−9½	−15	+2½	+3½	−70	+9½	+41

[1] Includes North Sea installations. [2] Not seasonally adjusted.

prices. Deliveries of chemicals, at £677 million, were little changed, while volume rose by 2½ per cent, a continued modest growth following the sharp rise in the first quarter. Arrivals of inorganic chemicals again rose strongly by 18 per cent in value reflecting a large increase in volume. Imports of organic chemicals fell by 6½ per cent in value from the high level of the two previous quarters, with a fall in both volume and price. Imports of medicinal and pharmaceutical products rose in value by 5½ per cent, while deliveries of plastics fell by 2 per cent.

Imports of other semi-manufactures increased by 16 per cent in value and 11 per cent in volume; excluding precious stones the increases were 11 per cent and 8½ per cent, respectively, in both cases following some falling back in the second quarter. Deliveries of iron and steel and of textiles rose in value by 10 per cent and 3 per cent, respectively, both largely due to increases in volume: the former rise followed one of similar magnitude in the second quarter. Imports of wood and cork manufactures increased by 3 per cent in value (higher prices), while arrivals of paper and paperboard fell in value by 2½ per cent (lower prices). Imports of non-metallic mineral manufactures rose by 49 per cent in value, from a somewhat low second quarter level, reflecting a sharp rise in arrivals of precious stones. Shipments of miscellaneous metal manufactures rose in value by 5½ per cent with increases in both volume and price.

Imports of finished manufactures, at £3,567 million, fell by 9½ per cent in value and 9 per cent in volume; excluding the more erratic items there was a 5 per cent rise in both value and volume. Imports of road vehicles increased in value by 3½ per cent – a smaller rise than in recent periods – with higher prices outweighing lower volumes. Arrivals of machinery rose by 2½ per cent in value with a

Table 16 Imports by commodity (detail)

Seasonally adjusted values. Overseas Trade Statistics basis

£ million cif

	1977				1978			Percentage change
	Year	2nd qtr	3rd qtr	4th qtr	1st qtr	2nd qtr	3rd qtr	Q3/Q2
Food, beverages and tobacco	5 945	1 561	1 547	1 336	1 521	1 562	1 595	+2
Food and live animals	5 383	1 423	1 391	1 207	1 347	1 360	1 368	+½
Meat and meat preparations	974	246	256	220	266	280	299	+6½
Dairy produce and eggs	460	130	102	137	135	163	75	−54
Cereals and animal feeding-stuff	1 031	283	268	215	213	215	241	+12
Fruit and vegetables	1 114	287	270	269	259	257	277	+8
Other food and live animals	1 804	502	487	361	461	481	469	−2½
Beverages and tobacco	562	138	156	129	174	201	227	+13
Beverages	306	76	78	76	85	82	95	+16
Tobacco	256	58	79	50	95	115	139	+21
Fuels	5 252	1 377	1 278	1 223	1 267	1 078	1 256	+17
Industrial materials	13 491	3 462	3 324	3 346	3 606	3 542	3 891	+10
Basic materials	3 612	888	897	847	845	809	829	+2½
Crude materials	3 330	826	822	775	787	751	745	−1
Wood, lumber and cork	633	164	151	153	141	157	140	−10
Pulp and waste paper	440	116	108	94	86	85	83	−3
Textile fibres	462	111	101	119	122	122	121	−1½
Metal ores	753	182	207	154	165	156	163	+4½
Chemicals	2 365	593	599	569	653	673	677	+½
Organic chemicals	702	162	185	171	195	194	182	−6½
Inorganic chemicals	332	75	91	82	89	103	122	+18
Medicinal and pharmaceutical products	174	47	43	40	45	49	52	+5½
Plastics	545	135	130	137	157	154	151	−2
Other semi-manufactures	7 513	1 981	1 828	1 931	2 108	2 060	2 385	+16
Wood and cork manufactures	311	75	74	73	90	96	99	+3
Paper and paperboard	975	247	246	234	254	269	262	−2½
Textiles	1 131	279	280	291	334	357	366	+3
Non-metallic mineral manufactures	2 111	620	475	604	635	560	834	+49
Iron and steel	986	253	264	248	250	277	305	+10
Non-ferrous metals	1 130	286	262	274	282	273	278	+2
Miscellaneous metal manufactures	534	129	142	136	155	156	164	+5½
Finished manufactures	11 803	3 086	2 964	3 014	3 268	3 950	3 567	−9½
Machinery	5 298	1 297	1 369	1 347	1 442	1 569	1 612	+2½
Power generating machinery	691	171	177	169	194	204	216	+5½
Specialised machinery	882	202	237	218	250	271	271	—
Metal working machinery	224	58	55	59	68	83	76	−8½
General industrial machinery	995	247	256	262	275	300	310	+3½
Office machinery	912	217	242	231	252	270	272	+1
Telecommunications equipment etc	544	134	142	132	130	141	166	+18
Other electrical machinery	1 050	264	272	264	277	297	316	+6½
Road vehicles	2 133	496	555	598	669	710	734	+3½
Other transport equipment [1]	1 349	553	280	291	305	762	226	−70
Other finished manufactures	3 023	741	760	778	852	908	995	+9½
Clothing and footwear	982	236	246	250	259	263	322	+23
Instruments	840	206	221	214	239	273	288	+5½
Miscellaneous	505	122	141	123	119	133	187	+41
Total	36 996	9 601	9 239	8 987	9 870	10 221	10 471	+2½

[1] Not seasonally adjusted.

Table 17 Imports by commodity: volume indices

Seasonally adjusted values. Overseas Trade Statistics basis

Indices 1975=100

				Industrial materials				Finished manufactures [1]				
									Machinery and transport equipment [2]			
	Total	Food beverages and tobacco	Fuels	Total	Basic materials	Chemicals	Other semi-manufactures	Total	Total	Machinery	Road vehicles	Other
SITC (rev 2)		0+1	3	2, 4, 5, 6	2+4	5	6	7+8	7	71-77	78	8
Weights	1 000	177	177	341	92	55	194	283	207	137	37	76
1970	82.8	101	117	89	128	83	73	56	56	61	39	53
1971	87.1	100	128	89	117	85	78	64	65	65	58	63
1972	95.8	102	127	97	119	97	87	80	81	83	90	75
1973	109.1	103	131	111	134	114	100	100	103	107	105	95
1974	109.3	100	123	114	120	123	109	102	104	115	90	99
1975	100.0	100	100	100	100	100	100	100	100	100	100	100
1976	106.4	102	100	112	119	122	106	109	108	104	127	110
1977	108.9	102	83	116	113	133	113	123	125	117	160	118
1976												
1st qtr	101.1	95	100	109	115	116	105	97	93	96	104	108
2nd	107.3	101	101	111	117	121	106	114	116	103	122	109
3rd	108.1	102	102	113	124	123	105	111	110	106	140	112
4th	109.0	108	98	115	120	126	109	114	115	113	140	112
1977												
1st qtr	109.6	106	87	117	122	137	109	118	117	116	148	120
2nd	112.2	107	85	117	109	134	116	130	134	116	150	118
3rd	108.0	105	80	114	111	135	110	123	125	120	168	116
4th	105.6	92	78	117	109	128	117	123	125	116	177	118
1978												
1st qtr	116.4	101	85	128	116	153	126	132	132	126	174	133
2nd	116.9	102	71	124	111	157	120	152	159	135	177	135
3rd	119.8	105	84	133	112	161	134	139	136	141	171	146
Percentage change Q3/Q2	+2½	+3	+18	+7½	+1½	+2½	+11	−9	−14	+4½	−3½	+8

[1] Includes North Sea installations. [2] Indices for other transport equipment SITC (rev 2) 79 are not separately available.

further rise – of 4½ per cent – in volume. Imports of power-generating machinery were up by 5½ per cent, while deliveries of general industrial machinery and office machinery rose in value by 3½ per cent and 1 per cent, respectively. Deliveries of metal-working machinery fell in value by 8½ per cent from a high second-quarter level. The value of telecommunication equipment imports increased by 18 per cent, with a marked rise in volume outweighing a fall in price. Within the continuing marked value increase of 9½ per cent of other finished manufactures, deliveries of clothing and footwear rose sharply by 23 per cent, largely reflecting higher volumes. The 41 per cent rise in the value of miscellaneous imports was mainly attributable to higher volumes.

Notes

Treatment of oil platforms in the second quarter import figures: The import figures for the second quarter include oil platforms valued on an Overseas Trade Statistics basis at around £500 million. The two platforms had been moved to Norway in July last year for completion. As there was no effective change in ownership, the import figures on a balance of payments basis include only the value of additional foreign goods (amounting to about £75 million) used in completing the platforms. This mirrors the treatment adopted for exports last July when the value of the platforms was included in the figures on an Overseas Trade Statistics basis but excluded on a balance of payments basis.

During the completion process, expenditure was incurred for services (the value of contracts for finishing the platform other than the supply of major items of equipment) and the estimates of net invisible earnings in recent quarters incorporate appropriate debits.

Figures for 1977: The figures for 1977 on an Overseas Trade Statistics basis included in the tables do not yet incorporate the latest information recently published by Customs and Excise in 'Overseas Trade Statistics of the United Kingdom, 1977'. The differences, however, are comparatively small. At the level of total trade, a balance of payments adjustment has been incorporated to reflect the later 1977 figures.

Revisions: Since the previous quarterly article, a number of revisions have been made to figures for 1978 in the light of later information. In particular, the balance of payments adjustment to allow for net under-recording of exports has been reduced, from the beginning of 1978, from 0.7 per cent to 0.3 per cent of the level of exports. The reduction has been made as a result of the regular monitoring of the figures and will be continued as appropriate. Revisions to figures on an Overseas Trade Statistics basis were incorporated in the monthly press notice on overseas trade issued on 14 November.

Standard notes: Standard notes on definitions and coverage of the figures were published in *Trade and Industry* of 17 February.

Inquiries: Economics and Statistics Division 5A, Room 234, Departments of Industry, Trade and Prices and Consumer Protection, 1 Victoria Street, London SW1H 0ET, tel. 01-215 5703/3385.

Table 18 Imports: value and volume indices excluding the more erratic items

Seasonally adjusted. Overseas Trade Statistics basis

			Industrial materials				Finished manufactures			
	Total [1]		Total [2]		Other semi-manufactures [2]		Total [3]		Machinery and transport equipment [3]	
	Value £ million	Volume 1975 = 100	Value £ million	Volume 1975 = 100	Value £ million	Volume 1975 = 100	Value £ million	Volume 1975 = 100	Value £ million	Volume 1975 = 100
1975	22 735	100.0	7 432	100	3 849	100	6 118	100	4 254	100
1976	29 399	106.7	10 081	114	4 909	108	8 219	110	5 748	109
1977	33 818	107.6	11 644	114	5 666	109	10 471	124	7 449	126
1976										
1st qtr	6 371	102.4	2 155	110	1 065	106	1 716	101	1 172	98
2nd	7 062	105.2	2 399	112	1 160	105	1 951	108	1 361	107
3rd	7 711	109.4	2 649	116	1 280	109	2 154	113	1 518	113
4th	8 255	109.7	2 879	116	1 405	110	2 397	117	1 698	119
1977										
1st qtr	8 624	111.0	3 034	119	1 450	112	2 518	122	1 773	123
2nd	8 443	107.1	2 856	111	1 375	104	2 534	121	1 794	123
3rd	8 593	108.6	2 951	116	1 455	112	2 691	126	1 931	130
4th	8 158	103.8	2 803	112	1 387	108	2 728	126	1 951	130
1978										
1st qtr	9 030	115.7	3 062	126	1 564	122	2 972	135	2 120	136
2nd	8 936	111.9	3 014	122	1 532	117	3 194	141	2 285	144
3rd	9 559	119.9	3 199	129	1 693	127	3 347	148	2 352	148
Percentage change Q3/Q2	+7	+7	+6	+5½	+11	+8½	+5	+5	+3	+3

[1] As in table 15 but excluding ships, North Sea production installations, aircraft and precious stones. [2] As in table 15 but excluding precious stones. [3] As in table 15 but excluding ships, North Sea production installations and aircraft.

Table 19 Imports by commodity: unit value indices

Seasonally adjusted values. Overseas Trade Statistics basis

Indices 1975 = 100

				Industrial materials				Finished manufactures				
									Machinery and transport equipment [1]			
	Total	Food, beverages and tobacco	Fuels	Total	Basic materials	Chemicals	Other semi-manufactures	Total	Total	Machinery	Road vehicles	Other
SITC (rev 2)		0 + 1	3	2, 4, 5, 6	2 + 4	5	6	7 + 8	7	71-77	78	8
1970	43.9	45	19	51	47	45	55	53	53	54	50	54
1971	46.0	48	24	50	48	46	53	56	56	56	54	55
1972	48.1	51	24	52	50	47	54	60	60	59	62	59
1973	60.9	67	31	66	66	56	70	69	68	68	71	70
1974	87.9	87	87	94	97	91	94	81	80	79	83	85
1975	100.0	100	100	100	100	100	100	100	100	100	100	100
1976	122.4	113	131	121	123	120	121	125	127	127	128	121
1977	141.5	132	148	141	145	140	140	144	146	144	155	131
1976												
1st qtr	110.4	105	119	107	107	108	107	113	115	115	116	110
2nd	119.2	112	127	117	118	117	117	122	124	124	125	116
3rd	125.6	114	135	125	128	123	124	128	130	131	129	123
4th	134.4	120	143	136	141	131	135	138	138	138	141	135
1977												
1st qtr	138.1	126	147	140	146	134	138	140	141	140	149	135
2nd	141.7	131	149	144	148	140	143	142	144	142	152	138
3rd	143.6	135	149	143	148	143	141	146	148	146	155	143
4th	142.6	137	146	139	139	143	138	148	151	147	161	142
1978												
1st qtr	141.6	139	138	138	131	142	140	150	154	148	172	141
2nd	146.1	142	141	143	133	145	147	156	158	150	185	149
3rd	148.0	143	139	146	135	147	151	159	162	151	193	152
Percentage change Q3/Q2	+1½	+½	−1½	+2½	+2	+1	+3	+2	+2	+1	+5	+2

[1] Indices for other transport equipment SITC (rev 2) 79 are not separately available.

Survey of company liquidity: third quarter 1978

The liquidity of the companies replying to the Department of Industry's survey of company liquidity fell in the third quarter of 1978 after rising for the four preceding quarters. The companies' net current assets, seasonally adjusted, fell by about £595 million in the quarter. Their liquidity ratio (total current assets as a percentage of total current liabilities), also seasonally adjusted, fell from 141 per cent at the beginning of the quarter to 123 per cent at the end. In seasonally-unadjusted terms, manufacturing companies accounted for most of the fall in net current assets.

Chart 1 illustrates the seasonally-adjusted changes in the companies' net current assets and in their liquidity ratio after other adjustments to allow for changes in the survey's coverage at the end of each year, making the results comparable over the whole period of the survey. The chart shows that both net current assets and the liquidity ratio have fallen back to below the first quarter 1978 level but are still above the previous peak in 1973. The liquidity ratio is the better measure over a long period because it is not directly influenced by inflation.

It must be kept in mind that the net current assets and the liquidity ratio do not summarise the whole financial position of the companies, only the position on the selected current assets and liabilities covered by the survey, and companies differ widely in the types of asset and liability they hold. The aggregate changes conceal differing movements for individual companies. Also, the survey covers only 230 or so large companies which may not be representative of industrial and commercial companies as a whole. In fact, in recent quarters, the companies in the survey appear to have been more liquid than industrial and commercial companies as a whole.

Table 1 and 2 show that, seasonally adjusted, the companies' total current assets fell by about £400 million and their total current liabilities rose by about £195 million, giving a fall in net current assets of about £595 million compared with the revised estimate of a rise of about £340 million in the previous quarter. On an unadjusted basis, total current assets fell by £219 million while liabilities rose by £129 million, giving a fall in net current assets of £348 million compared with the rise of £311 million in the previous quarter.

Manufacturing and non-manufacturing companies

Companies mainly engaged in manufacturing accounted for £324 million out of the £348 million unadjusted fall in net current assets, following a much smaller fall in the previous quarter. Table 3 shows that, unadjusted, their total current assets fell by £156 million and their total current liabilities rose by £168 million. Non-manufacturing companies' total current assets fell by £63 million and their total current liabilities by £38 million, resulting in a fall in net current assets of £25 million. This compares with a rise of £393 million in the previous quarter.

Charts 2 and 3, which are not seasonally adjusted but which have been adjusted to make results comparable over the whole period of the survey, show that total current

Chart 1 **Liquidity ratio and net current assets: all survey companies**
(Adjusted to allow for changes in coverage, seasonally adjusted)

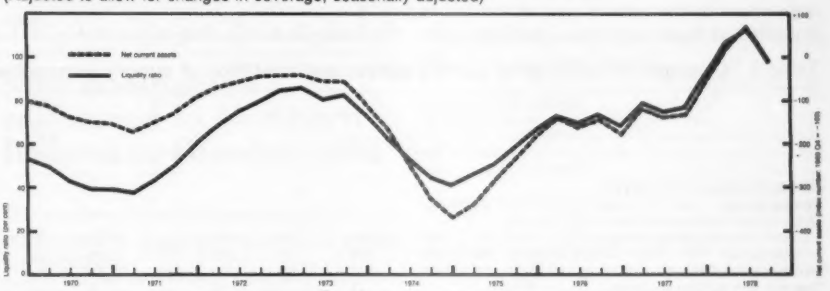

Table 1 **Holdings of current assets and liabilities by survey companies [1]: amounts outstanding at end of period** £ million

	1976			1977				1978			
	3rd qtr	4th qtr	4th qtr	1st qtr	2nd qtr	3rd qtr	4th qtr	4th qtr	1st qtr	2nd qtr	3rd qtr
Number of companies [2]	211	211	210	210	210	210	210	228	228	228	228
NOT SEASONALLY ADJUSTED											
Current assets											
Deposits with banks in the UK:											
Clearing banks	823	873	887	958	846	921	1 064	1 093	1 194	1 403	1 235
Other banks	1 378	1 246	1 249	1 340	1 326	1 312	1 525	1 748	2 013	2 333	1 980
Deposits with finance houses [3]	112	122	121	108	157	154	171	190	192	218	213
Deposits with building societies	3	3	3	3	3	3	6	7	10	6	5
Negotiatable certificates of deposit (sterling and dollar)	111	127	119	122	155	169	74	66	210	153	129
British government securities	257	298	289	301	336	353	377	437	418	438	440
Local authority bills and temporary money	167	238	234	244	191	178	171	166	162	119	134
Local authority mortgages and loans	45	64	65	88	80	91	73	106	93	77	72
Other current assets [4]	131	49	52	65	82	287	365	427	289	241	561
Total current assets [5]	3 027	3 021	3 019	3 228	3 176	3 469	3 826	4 238	4 580	4 989	4 770
Current liabilities											
Advances and loans from banks and other financial institutions in the UK:											
Clearing banks [6]	1 637	2 000	1 952	1 794	1 814	1 674	1 682	1 823	1 699	1 901	1 856
Other banks [6]	1 662	1 658	1 464	1 481	1 541	1 689	1 586	1 798	1 707	1 588	1 756
Other financial institutions [7]	117	72	49	57	64	74	52	59	93	108	113
Total current liabilities [6]	3 416	3 730	3 465	3 331	3 419	3 437	3 320	3 680	3 499	3 597	3 726
Net current assets	−389	−709	−446	−103	−243	32	506	558	1 081	1 392	1 044
Liquidity ratio (per cent) [8]	89	81	87	97	93	101	115	115	131	139	126
SEASONALLY ADJUSTED											
Total current assets	2 955	3 003	3 001	3 254	3 213	3 379	3 808	4 218	4 609	5 046	4 646
Total current liabilities	3 452	3 771	3 503	3 308	3 397	3 478	3 358	3 722	3 482	3 577	3 772
Net current assets	−497	−768	−502	−54	−184	−99	450	496	1 127	1 469	874
Liquidity ratio (per cent) [8]	86	80	86	98	95	97	113	113	132	141	123

Notes
[1] Companies in the Department of Industry's survey of company liquidity.
[2] Estimates are included until the end of the year for companies that ceased to reply during the year; those companies are then removed from the survey. Some companies were brought into the survey at the end of 1977. Two sets of figures are given for the fourth quarters to show the effects of these and other changes in coverage at year-ends.
[3] From the beginning of 1978, including only deposits with an initial term of not more than 12 months.
[4] Other current assets comprise holdings of notes and coin, Treasury bills and tax instruments.
[5] Components are rounded independently of the totals.
[6] From the beginning of 1975, including only advances and loans with an initial term of not more than 12 months.
[7] Including only advances and loans with an initial term of not more than 12 months.
[8] Total current assets as a percentage of total current liabilities.

assets of manufacturing companies, despite their fall in the latest quarter, are still historically high after the sharp rise between early 1975 and the first quarter of 1978. Total current liabilities of manufacturing companies have been relatively flat since early 1976 although, after rising for two quarters, they are now at the highest level for three years. The increase in non-manufacturing companies' total current assets was less prolonged than for manufacturing companies, from mid-1977 to mid-1978, but, although they have now fallen slightly from the previous quarter's level, they are higher than at any other time since the survey began. Their total current liabilities continue the fall experienced since the beginning of 1977.

For both types of company, the level of total current liabilities since the beginning of 1975 may have been affected by possible switching from short term to longer term borrowing, which, as mentioned in the notes at the end of this article, has not been covered by the survey since the beginning of 1975.

Changes in the composition of holdings

Table 2 shows that, in the third quarter, the major falls in current assets were in bank deposits, with the greater part of the fall in deposits with banks other than clearing banks.

Chart 2 **Total current assets: manufacturing and non-manufacturing survey companies**
(Adjusted to allow for changes in coverage, not seasonally adjusted)

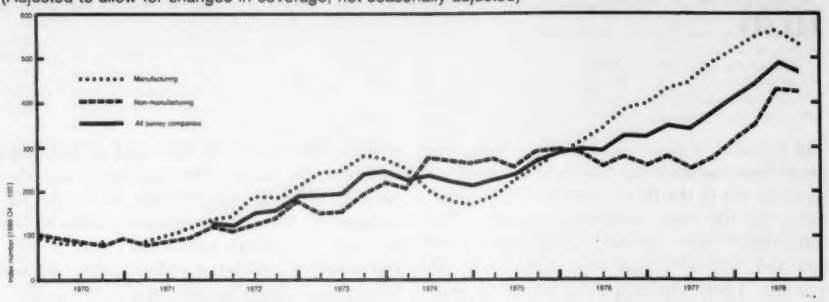

Chart 3 **Total current liabilities: manufacturing and non-manufacturing survey companies**
(Adjusted to allow for changes in coverage, not seasonally adjusted)

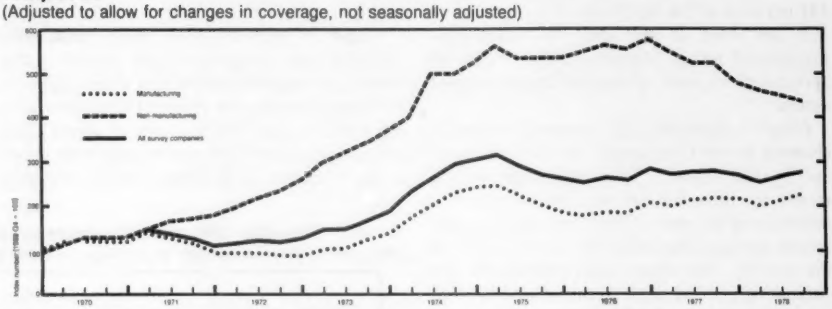

Table 2 **Changes in holdings of current assets and liabilities of survey companies** [1]

£ million

	1971	1972	1973	1974	1975	1976	1977	1976 4th qtr	1977 1st qtr	1977 2nd qtr	1977 3rd qtr	1977 4th qtr	1978 1st qtr	1978 2nd qtr	1978 3rd qtr
NOT SEASONALLY ADJUSTED															
Current assets															
Deposits with banks in the UK:															
Deposit banks/clearing banks [2]	49	117	173	73	133	215	177	50	71	−112	75	143	101	209	−168
Other banks [2]	91	240	258	21	302		276	−132	91	−14	−14	213	265	320	−353
Deposits with finance houses [3]	52	−21	−17	−101	33	25	50	10	−13	49	−3	17	2	26	−5
Deposits with building societies	2	−2	3	−1	−1	—	3	—	—	—	—	3	3	−4	−1
Negotiable certificates of deposit (sterling and dollar)	121	231	−47	−144	−12	30	−45	16	3	33	14	−95	144	−57	−24
British government securities	−13	16	39	−39	92	123	88	41	12	35	17	24	−19	20	2
Local authority bills and temporary money	61	55	121	−120	22	43	−63	71	10	−53	−13	−7	−4	−43	15
Local authority mortgages and loans	—	14	−10	15	−1	11	8	19	23	−8	11	−18	−13	−16	
Other current assets [4]	−1	−4	−23	7	92	−69	313	−82	13	17	205	78	−138	−48	320
Total current assets [5]	362	645	495	−291	663	379	807	−6	209	−52	293	357	342	409	−219
Current liabilities															
Advances and loans from banks and other financial institutions in the UK:															
Deposit banks/clearing banks [6] [8]	−246	162	611	765	−558	405	−270	363	−158	20	−140	8	−124	202	−45
Other banks [6] [8]	115	20	306	913	−100		122	−4	17	60	148	−103	−91	−119	168
Other financial institutions [7]	−21	27	9	30	9	−49	3	−45	8	7	10	−22	34	15	5
Total current liabilities [5]	−153	209	924	1 708	−649	356	−145	314	−134	88	18	−117	−181	98	129
Net current assets	515	436	−429	−1 999	1 312	23	952	−320	343	−140	275	474	523	311	−348
SEASONALLY ADJUSTED															
Total current assets								48	253	−41	166	429	391	437	−400
Total current liabilities								319	−195	89	81	−120	−240	95	195
Net current assets								−271	448	−130	85	549	631	342	−595

Notes: 1 and 3-7: see table 1. [8] To the end of 1975, the figures relate to the former groupings of deposit banks and other banks; from the beginning of 1976, five banks that were deposit banks have been re-grouped as other banks and the remainder renamed clearing banks. Combined figures are given for 1976 to avoid any possibility of disclosing figures relating to individual companies.

Table 3 **Holdings of current assets and liabilities by manufacturing and non-manufacturing survey companies [1]: amounts outstanding at end of period**

£ million

	1976 3rd qtr	1976 4th qtr	1976 4th qtr	1977 1st qtr	1977 2nd qtr	1977 3rd qtr	1977 4th qtr	1978 4th qtr	1978 1st qtr	1978 2nd qtr	1978 3rd qtr
MANUFACTURING COMPANIES											
Number of companies [2]	143	143	143	143	143	143	143	155	155	155	155
Not seasonally adjusted											
Total current assets [5]	1 709	1 775	1 762	1 879	1 966	2 144	2 284	2 659	2 846	2 887	2 731
Total current liabilities [5]	2 039	2 305	2 134	2 064	2 205	2 230	2 215	2 417	2 287	2 410	2 578
Net current assets	−330	−530	−372	−185	−239	−86	69	242	559	477	153
Liquidity ratio (per cent) [9]	84	77	83	91	89	96	103	110	124	120	106
NON-MANUFACTURING COMPANIES											
Number of companies [2]	68	68	67	67	67	67	67	73	73	73	73
Not seasonally adjusted											
Total current assets [5]	1 319	1 246	1 258	1 349	1 211	1 324	1 542	1 579	1 735	2 102	2 039
Total current liabilities [5]	1 377	1 425	1 331	1 267	1 213	1 207	1 105	1 263	1 212	1 186	1 148
Net current assets	−58	−179	−73	82	−2	117	437	316	523	916	891
Liquidity ratio (per cent) [9]	96	87	95	106	100	110	140	125	143	177	178

See notes 1, 2, 5 and 8 to table 1.

Most other items showed very little change, the main exception being the category 'other current assets' (notes and coin, Treasury bills and tax instruments). This rose by £320 million, chiefly because of an increase in tax instruments which also occurred, though not to the same degree, in the third quarter of 1977. Holdings of local authority bills and temporary money rose by £15 million after falling for the five preceding quarters and holdings of negotiable certificates of deposit fell by £24 million.

On the liabilities side, borrowing from clearing banks fell but was more than offset by the increase in borrowing from other banks. This pattern is the reverse of that in the previous quarter and similar to that of the third quarters of 1977 and 1976. There was little change in borrowing from other financial institutions.

Notes

About 230 of the largest United Kingdom industrial and commercial companies contribute to this survey, which covers certain assets and liabilities in the United Kingdom that can be realised or that are due to be paid, formally at least, within 12 months. An article describing the background to the survey, and reviewing the results since its start at the beginning of 1970, was published in *Economic Trends* for November 1974. A further article, in the May 1977 issue of *Economic Trends*, compared the results of the survey with those for all industrial and commercial companies up to the end of 1976.

The companies taking part are not a representative sample of industrial and commercial companies. Not all large companies are included and no small ones.

Another important limitation is that the results can give only part of the complete financial picture that would be given by the full sources and uses of funds account. This applies, in particular, to the two summary measures of liquidity, net current assets and the liquidity ratio, as the article in the November 1974 issue of *Economic Trends* explains. Furthermore, these measures, and the results as a whole, are aggregates for the survey group and they mask wide variation in the financial positions of individual companies.

There is a break in the results of the survey at the end of each year and two sets of figures for the fourth quarters of 1976 and 1977 are given in the tables with this article to show the effects. One reason for this is that since the beginning of the survey some companies have ceased to reply. Estimates for those companies are included in the tables until the end of the year in which they ceased to reply, except for companies that cease to reply because they had amalgamated with other companies in the survey. There have been changes in coverage within a few companies at the beginning of 1977, to make the coverage of this survey as close as possible to the coverage of the survey of company sources and uses of funds and in addition several extra companies began to contribute from the beginning of 1978, given a net increase in the number of companies.

Some changes in coverage, resulting from changes in definitions, were made in earlier years. In particular, at the beginning of 1975 the definition of current liabilities was clarified and companies were asked to exclude all advances and loans with an initial loan term of over 12 months. More recently, at the beginning of 1976, five banks that were deposit banks were re-grouped with other banks and the remainder of the group has been renamed clearing banks to conform with the reclassification of banks made by the Bank of England in 1975. Total figures for changes in deposits with banks and borrowing from banks are given for 1976 in table 2 to avoid any possibility of disclosure of individual company holdings as a result of this change.

Inquiries: Departments of Industry, Trade, and Prices and Consumer Protection, Economics and Statistics Division 6a, Room 248, 1 Victoria Street, London SW1H 0ET, tel. 01-215 5538.

Patents recorded 'licences of right'

Under section 46 of the Patents Act 1977 the register was noted 'licences of right' in respect of the following patents on the dates specified:

17 November 1978

1370672 The Post Office
Power feed arrangement for communication systems

1387565 The Post Office
Improvements in or relating to supplying a charging current by way of telephone lines

1410436 The Post Office
Improvements in or relating to classifying apparatus

1447317 The Post Office
Improvements in or relating to optical communications systems

1464114 The Post Office
Improvements in or relating to reducing unwanted modulation

1460333 The Post Office
Improvements in or relating to dielectric optical waveguides

1464113 The Post Office
Improvements in or relating to reducing unwanted modulation

1475884 The Post Office
Deposition of a pattern of a material on a substrate

1500025 The Post Office
Improvements in or relating to dielectric optical waveguide joints

1222226 Sumitomo Chemical Co Ltd
A method for producing 3, 4-Dichlorobutene-1

1243729 Sumitomo Chemical Co Ltd
Slurry explosive compositions

1265716 Sumitomo Chemical Co Ltd
Slurry explosives

1440220 Sumitomo Chemical Co Ltd
Process for preparing amide polyphosphates and their use as flame-retardants for cellulasic materials

1458802 Sumitomo Chemical Co Ltd
Intumescent fire-retardant coating compositions

1320535 Societe Anonyme Automobiles Citroen
Improvements in hydro-elastic vehicle suspension systems

1428400 Feb (Great Britain) Ltd
An improved method for the production of a bridge or road expansion joints

1513822 Parnall and Sons Ltd
A backrest adjustment mechanism for chairs

22 November 1978

1170563 Daimler-Benz Aktiengesellschaft
Improvements relating to vehicle seats

1177580 Daimler-Benz Aktiengesellschaft
Improvements relating to rear axle suspensions for vehicles

1193563 Daimler-Benz Aktiengesellschaft
Improvements relating to torsion-bar stabilisers for vehicles

1243156 Daimler-Benz Aktiengesellschaft
Improvements relating to ignition plugs for internal combustion engines

1275628 Daimler-Benz Aktiengesellschaft
Hand brake pull rod assembly

1087367 Societe Anonyme Automobiles Citroen
Hydropneumatic suspension for vehicles

1275417 Societe Anonyme Automobiles Citroen
Improvements in or relating to bearings

1449046 Societe Anonyme Automobiles Citroen
Improvements in or relating to end structures of vehicles

1389340 Societe Dauphinoise D'Etirage Et Profilage De Metaux
Suspending apparatus

1438220 Bayer Leichtmetallwerk Graf Blucher von Wahlstatt KG
A device for forging helical or spiral-toothed gear wheels, especially bevel gears

1462587 Gunther Berg Profilwerk
Apparatus for cladding battens

1494141 Agfa-Gevaert Aktiengesellschaft
Process for the production of a photographic image

1499231 Alexander Jan Vogelenzang
A flail type harvester

1518958 BFG Glassgroup
Fire-screening glazing panels

Any person who claims that the patentee at the time of endorsement of any of the above patents was precluded by a contract in which claimant is interested from granting licences under the patents may apply for cancellation of the endorsement on patent form no. 45 within three months after the date of endorsement.

I. J. G. Davis, Comptroller

New companies registered in Northern Ireland in October 1978

The number of companies registered in Northern Ireland in October and nominal capital are as follows:

	October 1978	January to October 1978	October 1977
Public companies limited by shares	—	—	—
Private companies limited by shares	79	660	44
Private unlimited companies	1	2	—
Public companies limited by guarantee not having a share capital	1	5	—
Private companies limited by guarantee not having a share capital	1	8	—
Private companies limited by guarantee having a share capital	—	—	—
Total nominal capital of companies incorporated	£6 057 300	£32 648 226	£1 900 500

Inquiries: Belfast 34121.

Business Monitors

The following titles and issues of Business Monitors are now available.

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PQ 392 Cutlery, spoons, forks, tableware including safety razors and blades for third quarter 1978
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PQ 399.10 Metallic closures for third quarter 1978
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PQ 461.2 Clay building bricks and other non-refractory goods for second quarter 1978

Business Monitors in the production series and miscellaneous series, and certain monitors (nos. SD1 to SD 9) in the service and distributive series, are available by annual subscription from Her Majesty's Stationery Office, PO Box 569, London SE1 9NH.

Copies of specific issues (including back issues) can be ordered by post (payable in advance) from the library at the Business Statistics Office, Newport, Gwent NPT 1XG (tel. 0633 5611, ext. 2973; telex 497121 – answer back BSONPT G).

Statistical News

This quarterly publication, prepared by the Central Statistical Office, is designed to keep the user of statistics in touch with all that is going on in the world of official statistics. Each issue contains notes on current developments as well as several articles treating selected topics in greater depth. A list of new surveys reported to the CSO's Survey Control Unit is also included.

Price 80p (by post 92p), annual subscription including postage £3.68. From HMSO, PO Box 569, London SE1 9NH.
ISSN 0017-3630

Official facts by computer?

New methods of disseminating official statistics based on computer technology are being examined by the Government Statistical Service.

John Boreham, director of the Central Statistical Office and head of the GSS, spoke on the subject at the recent annual statistics users' conference at the Royal Society.

'One method will be to make our data base system more accessible,' he said. 'At present it contains 30 000 economic time series and we are considering both how to extend it to industrial and social statistics and how to market and distribute it to customers. We may have to start with the printed word but perhaps soon we could use microfiche and, later, magnetic tapes.

'Perhaps most pregnant of all is the Post Office's Prestel system; we are engaged in producing frames of statistical tables for it. In time to come I believe this versatile screened presentation will greatly encourage the use of statistical guidance throughout government, industry, commerce, the social services and schools. We already have some 500 frames injected into this system and there is scope for a considerable increase on this number.'

'But,' Mr Boreham said, 'I suspect that publications and press notices will be our dominant media for quite a time yet.'

The GSS's first priority was to provide the government with a statistical service as a vital ingredient of its administrative and policy considerations. Its secondary role, was to provide the best possible service to users outside government. This service had to be shaped to the specific requirements of the customers and achieve the same standards of accuracy and integrity as the service to government. 'The more objective and open we can be with the statistical facts of life today, the better will people understand the problems that the nation is likely to encounter,' Mr Boreham said.

Particulars of dealers in securities and of unit trusts

The following changes have taken place in parts 1, 4 and 5 of the 1978 edition of 'Particulars of Dealers in Securities and of Unit Trusts' published in May under the Prevention of Fraud (Investments) Act 1958:

Part 1 Holders of principal's licences

Name		Nationality or country of incorporation	Address
Additions			
AG Securities		Great Britain	9 Grays Inn Square, London WC1
F. I. Menzies	*of Potter Partners*	Australian	66 Gresham Street, London EC2V 7AP
W. J. Conn	*of Potter Partners*	Australian	66 Gresham Street, London EC2V 7AP
J. R. L. Cuningham	*of Potter Partners*	British	28 Panton Street, Cambridge CB2 1DH
D. C. Damant	*of Investment Research*	British	
D. P. Charters	*of Investment Research*	British	
T. H. Stewart	*of Investment Research*	British	
A. G. Ellinger	*of Investment Research*	British	
Deletions			
New Japan Securities Ltd			
Bank Sanaye Iran			
Prescot Securities Ltd			
Cheuvreux [J. Cheuvreux, R. de Virieu & Cie]			
J. R. C. A. Cheuvreux			
R. de Virieu			
Barclays Mercantile Industrial Finance Ltd (Formerly Martins Bank (Finance) Ltd			
ABN Manchester (Securities Ltd			
Change of address		**To**	
Sanwa Bank (Underwriters) Ltd		5 Moorgate, London EC2R 6JH	
Parkdale Portfolio Management Ltd		32 Park Square, Leeds LS1 2PF	
Finanz AG London Ltd		24 Bishopsgate, London EC2N 4BQ	
Change of name		**To**	
The Federated Trust and Finance Corporation Ltd		Federated Trust Corporation Ltd	

Part 4 Exempted dealers including Trustee Savings Banks

Change of address	**To**
Industrial Mergers Ltd	91 Waterloo Road, London SE1 8XP
Change of name	**To**
Industrial Mergers Ltd	ICFC Corporate Finance Ltd

Part 5 Authorised unit trust schemes

Group and/or name and address of management company	Schemes	Trustee
Additions		
Chieftain Trust Managers Ltd, Chieftain House, 11 New Street, London EC2M 4TP	Chieftain Far Eastern Trust	Midland Bank Trust Co Ltd, 27-32 Poultry, London EC2P 2BX
Henderson Unit Trust Management Ltd, 11 Austin Friars, London EC2N 2ED	Henderson Smaller Companies Exempt Trust	Williams and Glyn's Bank Ltd, 20 Birchin Lane, London EC3P 3DP
Midland Bank Group Unit Trust Managers Ltd, 27-32 Poultry, London EC2P 2BX	Midland Drayton Japan and Pacific Unit Trust	Royal Exchange Assurance, Royal Exchange, London EC3V 3LS
Schlesinger Trust Manager Ltd, 19 Hanover Square, London W1A 1DU	Schlesinger American Smaller Companies Trust	Midland Bank Trust Co Ltd, 27-32 Poultry, London EC2P 2BX
Changes		
Delete		
Lawson Securities Ltd, 63 George Street, Edinburgh EH2 2JG	Lawson High Yield Fund	Clydesdale Bank Ltd, 30 St Vincent Place, Glasgow G1 2HL
And replace by		
Arbuthnot Securities Ltd, 25 Charlotte Square, Edinburgh EH2 4EZ	Arbuthnot High Yield Fund	Clydesdale Bank Ltd, 30 St Vincent Place, Glasgow G1 2HL
Changes		
In the entry for Lloyds Bank Unit Trust Managers Ltd		
Delete	*And replace by*	
Lloyds Bank First Unit Trust	Lloyds Bank Balanced Unit Trust	
Lloyds Bank Second Unit Trust	Lloyds Bank Worldwide Growth Unit Trust	
Lloyds Bank Third Unit Trust	Lloyds Bank Income Unit Trust	
Lloyds Bank Fourth Unit Trust	Lloyds Bank Extra Income Unit Trust	
In the entry for Target Trust Managers Ltd		
Delete	*And replace by*	
Target International Fund	Target Pacific Fund	
In the entry for Target Trust Managers (Scotland) Ltd		
Delete	*And replace by*	
Target Eagle Fund	Target American Eagle Fund	
In the group and/or management company entries		
Delete	*And replace by*	
Lawson Securities Ltd, 63 George Street, Edinburgh EH2 2JG	Lawson Securities Ltd, 25 Charlotte Square, Edinburgh EH2 4EZ	

Retail sales in October

Volume

The final seasonally adjusted index of the volume of retail sales in October is 109.6 (1971 = 100), virtually the same as the provisional estimate of 109½ (announced on November 13). It indicates that trade has continued around the same level as in September, when it was below the high level of sales in July and August, but above the level of earlier months of this year.

In the three months August to October the volume of sales was ½ per cent higher than in the previous three months. The average level of trade in the first 10 months of 1978 was about 4½ per cent above the annual average for 1977.

The volume of sales by clothing and footwear shops in the three months August to October was 3 per cent higher than in the previous three months. Sales by durable goods shops and by 'other non-food' shops, which include department stores and mail-order businesses, both rose by 1 per cent. Sales by food shops fell by 1 per cent between these periods.

Value

Based on non-seasonally adjusted data, the value of total retail sales in October was 14 per cent higher than in October 1977. In the first 10 months of 1978, the average value of sales was 14 per cent higher than in the corresponding period of 1977.

Notes

The indices for all shops, food shops, and total non-food shops are shown to the first decimal place to help interpretation, but should not be regarded as necessarily accurate to the final digit. The best indication of the recent trend is normally obtained by comparing the average index for the latest three months with the average for the immediately preceding three months, but month-to-month fluctuations may sometimes make it preferable to average two months or four months.

When using the volume figures, it should be borne in mind that, when price increases are large, the various problems associated with revaluation of the value series to constant prices become more acute. Thus, the relative accuracy with which volume changes have been measured is likely to have been reduced in recent periods.

The monthly periods consist of four weeks except those marked [1] which are of five weeks. The October 1978 sales period was the four weeks from 1 October 1978 to 28 October 1978. The corresponding period in 1977 was the four weeks from 2 October 1977 to 29 October 1977.

The value estimates are compiled inclusive of VAT, and will, therefore, reflect changes in the rates of VAT. The volume estimates, however, are not affected by these changes since the retail price indices used to 'deflate' the value data are themselves inclusive of VAT.

Within the total, sales are analysed by 'kinds of business'; ie the statistics are of sales by particular kinds of shop rather than of sales of particular commodities. For example, while sales by shops classified as food shops are mainly of food, many of them also sell other goods. Similarly, some food is sold by shops classified to other kinds of business.

The seasonally adjusted series include, where appropriate, adjustments for the timing of holidays and adjustments to make allowance for the inclusion of an extra week in the January 1975 trading period. No adjustments are made to the non-seasonally adjusted data.

The article giving the provisional estimate of the seasonally adjusted index of the volume of retail sales for November and the increase in value of sales compared with a year earlier will be published later this month.

Inquiries: Departments of Trade, Industry, and Prices and Consumer Protection, Economics and Statistics Division 6c, Room 351, Sanctuary Buildings, 20 Great Smith Street, London SW1P 3DB, tel. 01-215 3705.

Table 1 Volume of retail sales seasonally adjusted

Index numbers of sales per week (average 1971 prices) 1971 = 100

(Sales in 1971 – £ million Final estimates)	All kinds of business (16 296)	Food shops (6 866)	Non-food shops Total (9 430)	Clothing and footwear shops (2 436)	Durable goods shops (1 897)	Other non-food shops [2] (5 097)
1971	100.0	100.0	100.0	100	100	100
1972	105.3	101.6	107.9	104	113	108
1973	110.3	101.6	116.6	108	127	117
1974	109.0	102.4	113.8	106	122	115
1975	106.7	100.0	111.5	106	119	111
1976	106.5	98.7	112.1	106	122	111
1977	103.6	94.8	110.0	105	119	109
1977						
1st qtr	103.3	94.9	109.3	105	116	109
2nd	102.5	94.7	108.2	101	118	108
3rd	104.3	94.4	111.5	107	121	110
4th	104.4	95.3	111.1	109	121	109
1978						
1st qtr	106.3	96.6	113.3	110	125	111
2nd	108.0	98.1	115.2	110	129	112
3rd	110.8	98.1	120.1	117	135	116
1977						
October	102.7	94.2	108.9	103	120	108
November	103.1	93.9	109.8	107	118	108
December [1]	106.9	97.3	113.9	114	125	110
1978						
January	104.9	95.1	112.0	105	129	109
February	106.8	96.8	114.1	109	130	111
March [1]	107.0	97.6	113.8	115	117	112
April	106.7	96.5	114.2	108	132	111
May	108.4	98.9	115.4	113	126	112
June [1]	108.7	98.7	116.0	110	130	113
July	111.4	98.4	120.9	116	138	117
August	111.8	97.9	121.9	121	134	118
September [1]	109.5	97.9	118.0	115	133	114
October	109.6	97.9	118.2	114	131	115
1978						
May-July	109.4	98.7	117.3	113	132	114
1978						
August-October	110.2	97.9	119.3	117	133	116
Percentage increase	0.7	— 0.8	1.7	3	1	1

[1] Five-week period.
[2] Including department stores and mail-order businesses.

Table 2 Value of retail sales seasonally adjusted

Index numbers of value of sales per week (current prices) 1971 = 100

(Sales in 1971 – £ million Final estimates)	All kinds of business (16 296)	Food shops (6 866)	Non-food shops Total (9 430)	Clothing and footwear shops (2 436)	Durable goods shops (1 897)	Other non-food shops [2] (5 097)
1971	100.0	100.0	100.0	100	100	100
1972	112.0	109.0	114.2	112	118	114
1973	126.9	123.0	129.8	128	136	128
1974	146.7	144.9	148.1	148	144	149
1975	174.4	175.0	174.0	171	168	178
1976	200.1	204.8	196.7	189	187	204
1977	228.0	234.7	223.1	216	206	233
1977						
1st qtr	216.4	223.8	211.0	204	192	222
2nd	222.0	230.4	215.8	204	202	227
3rd	234.2	239.4	230.4	224	213	240
4th	239.4	245.3	235.1	231	219	243
1978						
1st qtr	246.0	249.5	243.5	237	228	252
2nd	254.5	258.6	251.5	243	243	258
3rd	267.5	266.9	267.9	266	254	274
1977						
October	234.2	241.7	228.7	218	214	239
November	236.3	242.3	231.9	228	213	241
December [1]	246.0	250.6	242.7	244	227	248
1978						
January	241.0	245.0	238.0	223	233	247
February	246.5	249.4	244.4	235	237	252
March [1]	249.8	253.2	247.3	250	217	257
April	250.3	252.3	248.9	235	250	255
May	255.2	260.0	251.6	250	236	258
June [1]	257.3	262.5	253.5	245	244	261
July	265.8	265.6	266.0	261	257	272
August	270.3	266.7	272.9	275	253	279
September [1]	266.6	268.0	265.5	262	253	272
October	267.2	267.9	266.7	260	249	277
1978						
May-July	259.3	262.7	256.8	251	246	264
1978						
August-October	267.9	267.6	268.1	265	252	276
Percentage increase	3.3	1.9	4.4	6	3	5

[1] Five-week period.
[2] Including department stores and mail-order businesses.

Studies in official statistics no. 31

Regional accounts

This booklet, prepared by the Central Statistical Office, describes the data sources and methods used in estimating gross domestic product, personal incomes and components of final expenditure for Scotland, Wales, Northern Ireland and the eight economic planning regions of England. A Continental Shelf region is also distinguished; this includes the profits of the UK offshore oil and gas activity. Certain of the estimates are further subdivided within the South East region to distinguish the Greater London area.

The booklet provides an essential background for regional economists and others concerned with the interpretation of the published data in the regional accounts. The concepts adopted for the individual items within the accounts and the limitations of the data and methods used to produce the estimates are fully discussed.

Price £1.75 net (£1.90 by post). ISBN 0 11 630161 9

Hire purchase and other instalment credit business in October

Finance houses and retailers advanced £469 million of new instalment credit in October, after allowing for seasonal factors. Lending by finance houses was slightly higher than in September. Lending by retailers was lower than in recent months.

Total advances in the latest three months, August to October, were 4 per cent higher than in the previous three months. Lending by finance houses increased by 5 per cent between the two three-month periods. Lending by retailers increased by 3 per cent.

The average weekly value of instalment credit sales by retailers in October was lower than in each of the previous three months. In the latest three months, August to October, average sales were 3 per cent higher than in the previous three months. Within this total, sales by durable goods shops were unchanged, sales by department stores (including those by Co-operative Societies) decreased by 2 per cent and sales by other instalment credit retailers (mainly mail-order business) increased by 5 per cent.

The debt outstanding to finance houses and retailers (mainly mail-order business) increased by 5 per cent.

August to October to £229 million, compared to £241 million in May to July. Amounts outstanding to finance houses increased by £175 million and those to retailers by £54 million during the latest three-month period. At the end of October, the total amount outstanding to finance houses and retailers was £4,109 million (*not* seasonally adjusted), 30 per cent more than a year earlier.

Inquiries: Departments of Trade, Industry, and Prices and Consumer Protection, Economics and Statistics Division 6a, Room 349, Sanctuary Buildings, 20 Great Smith Street, London SW1P 3DB, tel. 01-215 3162.

Table 1 Hire purchase and other instalment credit business seasonally adjusted

£ million

	Total		Finance houses[1]		Retailers[2]	
	New credit extended	Change in debt	New credit extended	Change in debt	New credit extended	Change in debt
1971	2 036	251	990	165	1 046	86
1972	2 466	438	1 222	296	1 244	142
1973	2 846	444	1 453	332	1 393	112
1974	2 508	−164	1 037	−160	1 471	−4
1975	2 981	−13	1 201	−55	1 780	42
1976	3 586	343	1 535	202	2 051	141
1977	4 392	625	2 072	500	2 320	125
1976						
4th qtr	968	127	421	83	547	44
1977						
1st qtr	1 007	144	457	89	550	55
2nd	1 047	136	486	118	561	18
3rd	1 149	186	544	148	605	38
4th	1 189	159	585	145	604	14
1978						
1st qtr	1 260	245	626	182	634	63
2nd	1 393	281	716	227	677	54
3rd	1 427	223	701	167	726	56
1977						
November	401	53	198	45	203	8
December	410	61	208	61	202	—
1978						
January	429	85	213	62	216	23
February	418	82	201	57	217	25
March	413	78	212	63	201	15
April	463	93	231	66	232	27
May	471	82	243	74	228	8
June	459	106	242	87	217	19
July	458	53	213	40	245	13
August	493	97	252	71	241	26
September	476	73	236	56	240	17
October	469	59	242	48	227	11
1978						
May-Jul	1 388	241	698	201	690	40
Aug-Oct	1 438	229	730	175	708	54
Percentage increase	4		5		3	

[1] Direct business only: ie excluding agreements block discounted with finance houses by retailers. [2] Durable goods shops, department stores and 'other instalment credit retailers'. For further definitions see footnotes to table 2.

Table 2 Retailers' instalment credit sales seasonally adjusted

Index numbers of value of sales per week (current prices)

1971 = 100

	Total[1]	Durable goods shops	Department stores	Other instalment credit retailers[2]
(HP and other instalment credit sales in 1971 £ million[3])	(1130)	(370)	(139)	(621)
1971	100	100	100	100
1972	117	117	106	120
1973	132	119	119	143
1974	139	94	122	169
1975	165	115	143	200
1976	190	136	162	229
1977	217	142	171	272
1976				
4th	200	138	166	244
1977				
1st qtr	205	135	166	256
2nd	210	136	153	266
3rd	227	148	179	284
4th	227	148	184	283
1978				
1st qtr	237	167	183	291
2nd	254	172	199	315
3rd	272	174	219	342
1977				
November	228	147	189	285
December [4]	228	155	183	281
1978				
January	243	180	187	293
February	244	166	189	302
March [4]	228	157	175	281
April	262	185	178	326
May	256	168	196	321
June [4]	246	165	217	300
July	275	178	231	343
August	271	174	204	344
September [4]	270	171	221	340
October	258	163	205	327
1978				
May-Jul av.	258	170	215	320
Aug-Oct av.	267	169	211	337
Percentage increase	3	–	−2	5

[1] Durable good shops, department stores (including co-operative societies) and 'other instalment credit retailers'. [2] General stores (other than department stores) and general mail-order houses. [3] Excluding sales against checks issued by other organisations. [4] The monthly periods for retailers consists of four weeks except those marked [4] which are of five weeks. The period covered by October 1978 sales was the four weeks from 1 October 1978 to 28 October 1978. The corresponding period in 1977 was from 2 October 1977 to 29 October 1977.

Wholesale price indices in November

Output prices

The provisional price index for the home sales of manufactured products increased by ½ per cent in November to 157.1 (1975 = 100).

The index for manufactured products other than food, drink and tobacco was ½ per cent higher as a result of small price increases spread across most sectors. This index has risen 2 per cent in the latest three months.

There was little change in November in the index for the output of the food manufacturing industries. This index rose by ¾ per cent in the latest three months.

The change in the index for all manufactured products measured over a twelve-month period was 7¾ per cent for the fourth successive month. The increase in the index over the latest six months fell from 3¾ to 3½ per cent.

Input prices

The provisional price index for materials and fuel purchased by manufacturing industry increased by 1 per cent in November to 147.2 (1975 = 100). This index has risen by 3¾ per cent over the last twelve months.

The index for coal, gas and electricity was unchanged in November.

The index for materials purchased by manufacturing industry other than food, drink and tobacco industries increased by 1½ per cent in November. Higher sterling prices for crude oil, resulting from a recovery in the dollar, made the most significant contribution. With crude oil excluded, the index rose by ¾ per cent; in particular, there were higher prices for hides and skins and mohair.

Higher prices for home-produced materials, especially home landed fish, were mainly responsible for the ¾ per cent increase in the index for *materials* purchased by the food manufacturing industries.

1975 = 100

	Sept	Oct p	Nov p
Output prices (home sales)			
All manufactured products	155.7	156.6	157.1
Products of manufacturing industry other than food, drink and tobacco industries	153.3	154.5	155.1
Products of the food manufacturing industries	164.4	164.7	164.8
Prices of materials and fuel purchased			
By manufacturing industry	144.8	145.8	147.2
materials	143.7	144.8	146.4
coal, gas and electricity	152.8	153.0	153.0
By manufacturing industry other than food, drink and tobacco industries	139.1	139.9	141.6
materials	136.4	137.4	139.4
By food manufacturing industries	157.6	159.0	159.9
materials	157.7	159.1	160.1

p Provisional

Inquiries: 01-215 3351.

ECGD addresses

The Export Credits Guarantee Department's head office is at Aldermanbury House, Aldermanbury, London EC2P 2EL, tel. 01-606 6699. ECGD has 10 local offices in various parts of the United Kingdom, and these are listed from time to time in *Trade and Industry*.

Metal-working machine tools: sales and orders in August

The total sales figures of metal-working machine tools for the latest three-monthly period shown in table 1 are some 9 per cent below the value for the preceding three-monthly period. Nevertheless, even with inflation still at an appreciable level, the seasonal pattern is sufficiently marked for this particular comparison to suggest that the underlying movement in real terms is at least level.

However, on a 12-month comparison (given in the bottom line of table 1) an upward trend in real terms may be seen. There is no doubt however that sales in the export market have declined in real terms over the more recent comparison and is only showing a marginal increase over the 12 monthly period when inflation is taken into account. Compared with last month the overall sales situation is generally weaker.

The level of new orders from the export market has improved for the latest three months compared with the preceding period (see bottom line but one of table 1). This reflects an upwards movement in real terms when seasonal patterns are taken into account although on not to firm a basis. On the annual comparison both home and export new orders show a rise in current values of near 15 per cent, sufficiently close to the estimated price movement to make identification of the trend uncertain.

Order books have lengthened over the last three months but orders-on-hand for the export market are appreciably down on 12 months ago. Home order books are however significantly stronger than 12 months ago resulting in some increase at current values for order books as a whole.

Table 1 Metal-working machine tools (part of MLH332): orders and sales

£ million current values

	Sales			Orders on hand [1]			Net new orders		
	Total	Home	Export	Total	Home	Export	Total	Home	Export
1972	185	112	73	114	56	58	192	121	71
1973	213	129	84	216	120	96	315	194	122
1974	255	150	105	313	164	149	348	192	156
1975	325	186	139	230	118	112	247	145	102
1976	352	209	143	194	101	93	316	192	124
1977	403	250	153	271	165	106	480	314	166
1977									
1st qtr	100	62	38	220	109	111	126	69	57
2nd	93	59	34	253	141	113	125	90	35
3rd	98	60	38	262	150	112	107	70	37
4th	113	69	44	271	165	106	122	84	38
1978									
1st qtr	120	77	43	268	168	100	116	80	36
2nd qtr r	124	78	46	273	180	93	129	90	39
1977									
July	29	19	10	258	146	112	33	24	9
August	32	21	11	261	147	114	35	22	13
September	38	21	17	262	150	112	39	24	15
October	36	21	15	263	156	107	37	27	10
November	37	22	15	268	161	107	42	27	15
December	39	25	14	271	165	106	42	29	13
1978									
January	34	22	12	270	165	105	33	22	11
February	38	25	13	276	170	106	44	30	14
March	47	30	17	268	168	100	39	28	11
April	34	20	14	283	182	101	49	34	15
May r	48	31	17	273	176	97	38	25	13
June r	42	27	15	273	180	93	42	31	11
July	36	24	12	285	187	98	48	31	17
August p	39	27	12	288	188	100	42	28	14
Three monthly totals:									
June-Aug 1978	117	78	39	288	188	100	132	90	42
March-May 1978	129	81	48	273	176	97	126	87	39
June-Aug 1977	92	60	33	261	147	114	114	78	36
Percentage change[2] latest three months on:									
1 Previous three months	−9	−3	−22	+6	+6	+4	+4	+3	+6
2 A year earlier	+27	+32	+17	+11	+28	−12	+15	+16	+15

[1] The values for orders outstanding relate to the ends of the periods shown. p Provisional. r Revised.
[2] Percentage changes based on unrounded values.

Table 2 Metal-working machine tools: employment estimates

Thousands

1976		**1977**		**1978**	
1st qtr	51.2	1st qtr	51.0	1st qtr	51.5
2nd	50.3	2nd	51.0	2nd	50.9
3rd	50.8	3rd	51.6		
4th	50.9	4th	52.2	**1978**	
				Jan	51.6
				Feb	51.4
				Mar	51.4
				Apr	51.0
				May	51.0
				June	51.7
				July	50.6
				August p	50.7

p Provisional.

Employment

Employment in the metal-working machine tool industry (part of MLH 332) is given in seasonally unadjusted terms in table 2; it may be seen that there is little change between July and August.

Adjustment of estimates

The monthly estimates up to and including June 1978 have been adjusted to be consistent with the more comprehensive quarterly inquiry and the latest provisional estimates will be revised when the appropriate information becomes available. Net new orders and orders-on-hand have been adjusted to the same basis of coverage and valuation as sales.

The monthly statistics will be published in Business Monitor PM332 and full details of the quarterly inquiry can be found in Business Monitor PQ332.

Inquiries: Department of Industry, Mechanical Engineering Statistics, Room 612 Dean Bradley House, Horseferry Road, London SW1P 2AG, tel. 01-212 6044.

Current cost accounting:

Price indices for overseas countries

In 1977 the Central Statistical Office and the Inflation Accounting Steering Group jointly commissioned a study of the availability of price indices for current cost accounting in fourteen countries. The results of this study are available in a booklet, 'Current Cost Accounting: Guide to price indices for Overseas Countries', obtainable from Her Majesty's Stationery Office.

The booklet contains descriptions of the most appropriate indices, together with comments on their usefulness, for current cost accounting. In addition the booklet gives details of overseas price indices available in UN and OECD publications.

Price £1.60 (£1.72 by post). ISBN 0 11 630163 5

Cost indices for the aerospace and radio, radar and electronic capital goods industries

From this month, new series of cost indices with 1975 = 100 supersede the series with 1970 = 100. In addition to the change in base a number of changes have been made in the method of their calculation and these are described below.

Change of weighting base and reference year

Conventionally, price index numbers express prices in any given period as a percentage of those in a selected reference period; a convenient reference period is that of the weighting base. However the new indices are weighted according to the 1974 patterns of purchases but with the reference year of 1975 taken as 100. The 1974 patterns have been adopted because the latest source of detailed information on purchases is the 1974 purchases inquiry; the selection of 1975 rather than 1974 as the reference year is in accordance with the practice adopted for most official economic series.

New information

Apart from some differences brought about by changes in the headings in the purchases inquiry, practically the same indicators have been used in the new as in the old series. Wholesale price indices have, as before, been used wherever appropriate. Where items of expenditure fall outside their scope – items such as postage and telephone costs and employers' NI contributions – indices have again been constructed from data obtained from other sources, but the information now used is more appropriate for the purpose.

Method of calculation

A detailed explanation of the method of compilation of the cost indices was given in the introductory article in *Trade and Industry* of 3 February. Some changes, however, have been introduced with the rebased series, the most significant of which affects the indices for the radio, radar and electronics capital goods industry (MLH 367).

Unlike the 1970 = 100 series for this industry, the rebased indices for wages and salaries are based entirely on information relating to average earnings in the electrical engineering industry and all manufacturing industries respectively. This enables all the cost indices for MLH 367 to be held provisional for only a short period making them most suitable for contract price adjustment, the main use made of these indices by industry. These proxy indices are therefore strongly preferred by the trade associations.

The method of calculation of the 1975 = 100 series for the aerospace cost indices is unchanged except that the proxy index now chosen for interpolation of benchmark information relates to all manufacturing average earnings after seasonal adjustment (instead of unadjusted): this accords better with the base weighted specification of the cost indices and results in a smoother trend for the wages and salaries indices.

Multiplication factors

For the convenience of those who use the index numbers in long-term contracts, a table of multiplication factors is provided to enable users to extend the 1970 = 100 series beyond April 1978 with the monthly movements of the equivalent index in the 1975 = 100 series. These factors are obtained by dividing the

Table 1 Cost indices for the aerospace and radio, radar and electronic capital goods industries (MLH 383 and 367 respectively)

1970 = 100

	1977									1978			
	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr
1 BOUGHT OUT FINISHED GOODS PURCHASED BY													
Aerospace industry	256.1	260.2	260.4	263.0	263.2	265.4	268.9	273.6	274.7	277.2	279.2	282.4	288.6
Airframe sector	251.9	256.1	256.2	258.8	259.5	261.2	264.8	269.5	270.6	273.4	275.2	278.4	284.2
Aero-engine and aero-engine parts sector	259.2	263.3	263.6	266.3	266.4	268.8	272.2	276.5	277.8	280.4	282.4	285.5	291.8
Aero-engine parts sector	254.0	257.2	257.9	261.0	262.9	264.5	268.2	271.4	273.2	277.1	278.9	281.3	286.0
Aircraft components sector	261.4	265.2	265.4	268.0	267.9	270.2	273.3	277.4	278.4	280.5	282.4	285.6	291.9
2 OTHER MATERIALS PURCHASED BY													
Aerospace industry	309.9	310.2	309.9	315.5	315.2	318.3	319.8	317.3	317.1	316.6	316.9	319.5	323.0
Airframe sector	289.9	290.7	292.0	297.3	301.2	303.4	304.8	302.9	303.6	304.0	304.5	305.9	308.5
Aero-engine and aero-engine parts sector	305.0	305.1	304.9	307.9	310.2	315.6	318.9	317.6	317.5	319.3	319.6	321.4	324.0
Aero-engine parts sector	328.6	328.8	327.6	330.3	330.5	333.8	335.2	332.2	331.3	330.0	330.4	334.3	338.4
Aircraft components sector	319.6	319.8	318.9	322.2	322.7	324.0	324.3	320.8	320.4	317.9	317.9	321.5	325.9
3 ALL PURCHASES OF GOODS BY													
Aerospace industry	273.8	276.8	276.8	279.7	280.4	282.9	285.5	287.9	288.5	289.9	291.5	294.5	299.8
Airframe sector	260.7	264.0	264.4	267.6	269.1	270.9	273.9	277.1	278.1	280.3	281.9	284.6	289.7
Aero-engine and aero-engine parts sector	275.7	278.3	278.4	281.2	282.1	285.6	288.6	290.8	291.6	293.7	295.5	298.0	303.0
Aero-engine parts sector	284.2	286.2	286.1	289.0	290.2	292.5	295.0	295.7	296.4	297.9	299.5	302.5	306.8
Aircraft components sector	295.7	293.4	296.9	299.9	300.1	301.9	303.1	302.7	302.9	302.1	303.2	306.5	311.6
Radio, radar and electronic capital goods industry	252.5	257.4	258.0	260.6	261.7	263.2	265.8	269.6	269.7	272.2	238.2	277.3	281.7
4 SALARIES AND GENERAL EXPENSES													
Aerospace industry	253.4	257.5	257.5	259.7	258.0	260.6	264.1	270.1	271.3	273.2	275.1	278.5	288.4
Airframe sector	250.7	255.0	254.8	256.9	255.0	257.8	261.4	267.8	269.0	270.9	273.0	276.4	285.7
Aero-engine and aero-engine parts sector	258.9	263.0	263.0	265.2	263.7	266.2	269.5	275.2	276.4	278.3	280.2	283.4	292.9
Aero-engine parts sector	251.7	255.6	256.0	258.3	257.0	259.6	263.0	268.5	269.8	271.8	273.4	277.1	286.8
Aircraft components sector	248.4	252.3	252.2	254.5	252.7	255.3	258.9	265.0	266.2	268.0	270.0	273.3	283.2
Radio, radar and electronic capital good industry	232.7	237.7	237.0	239.8	236.8	240.1	244.7	252.8	254.1	255.9	258.3	262.6	273.2
5 HOURLY EARNINGS OF ADULT MANUAL WORKERS													
Aerospace industry	254.2	258.3	257.2	259.0	256.0	258.9	262.9	271.6	272.8	274.3	276.7	280.9	289.2
Radio, radar and electronic capital goods industry	276.7	278.4	276.0	277.3	279.3	279.4	283.3	302.0	294.4	298.3	299.6	308.6	314.1
6 COMBINED COSTS													
Aerospace industry	260.2	265.2	265.0	267.4	266.3	278.9	272.2	277.4	278.4	280.0	281.9	285.3	293.1
Airframe sector	253.8	259.0	258.8	261.2	260.3	262.7	266.2	272.0	273.1	275.0	277.0	280.4	288.0
Aero-engine and aero-engine parts sector	262.6	267.6	267.4	269.7	268.7	271.7	275.0	280.2	281.2	283.1	285.1	288.3	295.8
Aero-engine parts sector	260.8	265.6	265.4	267.7	266.6	269.2	272.5	277.7	278.7	280.4	282.4	285.9	293.6
Aircraft components sector	263.2	267.9	267.4	269.8	268.2	270.6	273.6	278.6	279.5	280.4	282.3	285.9	293.8
Radio, radar and electronic capital goods industry	248.2	253.6	253.2	255.7	255.4	257.3	260.9	268.8	268.1	270.5	272.3	277.0	283.9

Definitive information on earnings for both manual and administrative, technical and clerical (ATC) workers for the aerospace industry is available only for certain months of the year – manual earnings information is available for April and October each year, ATC salaries information is available for April of each year.

Revisions to series brought about as a result of ATC salaries information becoming available will be shown in the article to be published on 7 December next year and will affect indices from May this year up to and including those of next August.

Revisions to series incorporated as a result of manual earnings information from the October survey are published in the April article and these affect series from the proceeding November up to and including December. The results obtained from the April aerospace survey will affect indices from last November up to and including June and will be shown in the article published on 5 October.

The indices for wages and salaries for the radio, radar and electronic capital goods industry are based entirely on information relating to average earnings in the electrical engineering industry and all manufacturing industries respectively.

The cost index tables previously D1-D5 and D7 have been redesignated sections 1 to 6 in the table.

The indices of combined costs are based on the assumption of no change in productivity.

r = Revised.

Bankruptcy records for England and Wales

Details of bankruptcies in England and Wales are maintained in a public search room at Room 901, Thomas More Building, Royal Courts of Justice, Strand, London WC2A 2JY.
Searches can be made personally or by an agent and a fee of 25p in respect of each bankruptcy inquiry is payable at the time.

1970 = 100 index for April 1978 by the corresponding 1975 = 100 index. In order to extend the 1970 series, the appropriate monthly index on the new base is multiplied by the factor shown in the table.

Conclusion

The publication of the cost indices is intended to satisfy a long-standing and widespread demand for an indication of movements in costs that manufacturers in the aerospace and radio, radar and electronic capital goods industries have to meet. They are subject to important data limitations as explained in this article and in the introductory article on 3 February.

Multiplication factors for use with cost indices (see text)

1 BOUGHT OUT FINISHED GOODS PURCHASED BY	
Aerospace industry	1.911
Airframe sector	1.900
Aero-engine and aero-engine parts sector	1.916
Aero-engine parts sector	1.878
Aircraft components sector	1.955
2 OTHER MATERIALS PURCHASED BY	
Aerospace industry	2.142
Airframe sector	2.015
Aero-engine and aero-engine parts sector	2.154
Aero-engine parts sector	2.261
Aircraft components sector	2.158
3 ALL PURCHASES OF GOODS BY	
Aerospace industry	1.988
Airframe sector	1.924
Aero-engine and aero-engine parts sector	1.997
Aero-engine parts sector	2.026
Aircraft components sector	2.073
Radio, radar and electronic capital goods industry	1.884
4 SALARIES AND GENERAL EXPENSES	
Aerospace industry	1.929
Airframe sector	1.928
Aero-engine and aero-engine parts sector	1.940
Aero-engine parts sector	1.884
Aircraft components sector	1.887
Radio, radar and electronic capital goods industry	1.786
5 HOURLY EARNINGS OF ADULT MANUAL WORKERS	
Aerospace industry	2.090
Radio, radar and electronic capital goods industry	2.197
6 COMBINED COSTS	
Aerospace industry	1.978
Airframe sector	1.947
Aero-engine and aero-engine parts sector	1.985
Aero-engine parts sector	1.973
Aircraft components sector	1.995
Radio, radar and electronic capital goods industry	1.894

Table 2 **Cost indices for the aerospace and radio, radar and electronic capital goods industries (MLH 383 and 367 respectively)** 1975 = 100

	1978					
	Apr	May	Jun	Jul	Aug	Sep
1 BOUGHT OUT FINISHED GOODS PURCHASED BY		p	p	p	p	p
Aerospace industry	151.0	152.0	154.8	155.3	155.6	157.0
Airframe sector	149.6	150.1	151.7	152.2	152.6	154.3
Aero-engine and aero-engine parts sector	152.3	153.8	157.4	158.1	158.3	159.4
Aero-engine parts sector	152.3	153.9	157.2	158.5	158.7	159.6
Aircraft components sector	149.3	149.9	151.5	152.3	152.7	154.2
2 OTHER MATERIALS PURCHASED BY						p
Aerospace industry	150.8	151.7	153.0	154.0	154.7	156.0
Airframe sector	153.1	153.7	155.2	156.1	156.7	157.8
Aero-engine and aero-engine parts sector	150.4	151.1	152.6	153.8	154.6	156.4
Aero-engine parts sector	149.7	150.9	152.0	153.3	154.2	155.4
Aircraft components sector	151.0	152.3	153.2	154.2	154.7	155.8
3 ALL PURCHASES OF GOODS BY		p	p	p	p	p
Aerospace industry	150.8	151.9	154.1	154.8	155.3	156.6
Airframe sector	150.6	151.4	153.0	153.6	154.1	155.5
Aero-engine and aero-engine parts sector	151.7	153.1	156.1	156.9	157.3	158.5
Aero-engine parts sector	151.4	152.7	155.1	156.4	156.9	157.9
Aircraft components sector	150.3	151.6	152.7	153.6	154.1	155.3
						p
Radio, radar and electronic capital goods industry	149.5	150.6	151.8	152.5	152.8	154.3
4 SALARIES AND GENERAL EXPENSES		p	p	p	p	p
Aerospace industry	149.5	149.3	151.4	151.4	151.6	153.3
Airframe sector	148.2	148.1	150.1	150.1	150.3	152.0
Aero engine and aero-engine parts sector	151.0	150.8	152.9	153.0	153.2	154.8
Aero-engine parts sector	152.2	152.1	154.1	154.3	154.6	156.3
Aircraft components sector	150.1	150.0	152.1	152.1	152.2	154.0
						p
Radio, radar and electronic capital goods industry	153.0	152.9	155.0	155.0	155.1	156.9
5 HOURLY EARNINGS OF ADULT MANUAL WORKERS		p	p	p	p	p
Aerospace industry	138.4	137.8	140.2	140.1	140.2	142.1
						p
Radio, radar and electronic capital goods industry	143.0	145.7	148.1	146.9	144.9	146.8
6 COMBINED COSTS		p	p	p	p	p
Aerospace industry	148.2	148.6	150.8	151.2	151.4	153.0
Airframe sector	147.9	148.2	150.0	150.3	150.6	152.2
Aero-engine and aero-engine parts sector	149.0	149.6	152.2	152.6	152.9	154.4
Aero-engine parts sector	148.8	149.2	151.5	152.1	152.5	153.9
Aircraft components sector	147.3	147.6	149.4	149.7	149.9	151.5
						p
Radio, radar and electronic capital goods industry	149.9	150.7	152.5	152.6	152.5	154.2

Definitive information on earnings for both manual and administrative, technical and clerical (ATC) workers for the aerospace industry is available only for certain months of the year – manual earnings information is available for April and October each year, ATC salaries information is available for April of each year.
Revisions to series brought about as a result of ATC salaries information becoming available will be shown in the article to be published on 7 December next year and will affect indices from May this year up to and including those of next August.
Revisions to series incorporated as a result of manual earnings information from the October survey are published in the April articles and these affect series from the preceeding November up to and including December. The results obtained from the April aerospace survey will affect indices from last November up to and including June and will be shown in the article published on 5 October.
The indices for wages and salaries for the radio, radar and electronic capital goods industry are based entirely on information relating to average earnings in the electrical engineering industry and all the manufacturing industries respectively.
The cost index tables previously D1-D5 and D7 have been redesignated sections 1 to 6 in the table.
The indices of combined costs are based on the assumption of no change in productivity.
p = Provisional

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Office development permits: third quarter

Office development permits issued by the Department of the Environment in the third quarter of 1978 covered 6.2 million sq ft compared with 3.0 million sq ft in the third quarter of 1977 and a quarterly average of 3.5 million sq ft for 1977 as a whole. Fifty-four permits were issued in the third quarter of 1978, 23 more than in the corresponding quarter of 1977.

After deduction of relinquishments of existing offices and of floorspace covered by permits for the continuing use of existing offices included in the total figures, there was a potential addition to office space by way of new building and conversion of non-office premises to office use of 4.7 million sq ft in the third quarter of 1978. This compares with 1.7 million sq ft for the corresponding quarter of 1977 and a quarterly average of 2.3 million sq ft for 1977 as a whole.

Seventeen of the 54 permits issued in the third quarter of 1978 were for office development in Central London and covered 3.0 million sq ft; 20 covering 1.6 million sq ft were for development in Greater London excluding the centre; and 13 covering 1.1 million sq ft for development in the metropolitan region outside Greater London. Four permits for a total floorspace of 0.5 million sq ft were issued in the part of the south-east planning region lying outside the metropolitan region.

Tables showing office development permits since 1965 appeared in *Trade and Industry*, 25 March 1977.

Inquiries: 01-212 8563.

Notes to table

Application of controls. Control was applied to the metropolitan region (Greater London and part of the south-east region) from 5 August 1965, but with retrospective application to 5 November 1964 for some projects, and to the west Midland conurbation from 14 August 1965. In July 1966 control was extended to the remainder of the south-east and west Midland regions and to the whole of the east Midland and East Anglia regions. In February 1969 East Anglia and rural parts of the Midlands were excluded and since December 1970 control has applied only to the south-east region.

Modification to controls. On 14 June 1977 the exemption limit for permits throughout the south-east region was raised from 15 000 to 30 000 sq ft. Office development permits are not required for offices ancillary to industrial development covered by an appropriate industrial development certificate.

Definition of areas. See *Trade and Industry*, 2 September 1977, page 432.

Area relinquished. Comprises office floor space relinquished for demolition or change of use to non-office uses.

Office development permits: sub-divisions of south-east planning region

	Central London			Rest of Greater London			Total Greater London			Metropolitan Region (excluding Greater London)			Total Metropolitan Region			South East (excluding Metropolitan Region)			Total South East		
		Thousand sq ft			Thousand sq ft			Thousand sq ft			Thousand sq ft			Thousand sq ft			Thousand sq ft			Thousand sq ft	
	No.	Gross	Relinquished	No.	Gross	Relinquished	No.	Gross	Relinquished	No.	Gross	Relinquished	No.	Gross	Relinquished	No.	Gross	Relinquished	No.	Gross	Relinquished
1975	64	4 883	448	106	5 414	442	170	10 297	890	86	2 258	51	256	12 555	941	46	1 319	113	302	13 874	1 054
1976	75	6 545	1 119	82	3 376	155	157	9 921	1 274	66	2 714	71	223	12 635	1 345	38	1 791	71	261	14 426	1 416
1977	57	5 674	328	53	5 210	224	110	10 884	552	36	1 960	37	146	12 844	589	19	1 226	10	165	14 070	599
1976																					
1st qtr	19	1 682	449	20	687	67	39	2 369	516	27	1 053	45	66	3 422	561	13	627	3	79	4 049	564
2nd	15	957	112	23	958	82	38	1 915	194	19	871	6	57	2 786	200	12	408	—	69	3 194	200
3rd	21	1 893	311	22	935	1	43	2 828	312	12	376	16	55	3 204	328	6	325	68	61	3 529	396
4th	20	2 013	247	17	796	5	37	2 809	252	8	414	4	45	3 223	256	7	431	—	52	3 654	256
1977																					
1st qtr	13	798	100	14	1 404	19	27	2 202	119	17	731	2	44	2 933	121	6	429	—	50	3 362	121
2nd	13	1 397	56	13	938	43	26	2 335	99	5	184	17	31	2 519	116	8	480	—	39	2 999	116
3rd	12	1 248	164	12	1 342	140	24	2 590	304	5	268	14	29	2 858	318	2	162	—	31	3 020	318
4th	19	2 231	8	14	1 526	22	33	3 757	30	9	777	4	42	4 534	34	3	155	10	45	4 689	44
1978																					
1st qtr	17	2 436	243	15	1 833	27	32	4 269	270	5	307	—	37	4 576	270	4	261	—	41	4 837	270
2nd	12	1 435	—	11	959	277	23	2 394	277	9	483	—	32	2 877	277	6	716	—	38	3 593	277
3rd	17	2 955	90	20	1 633	80	37	4 588	170	13	1 081	—	50	5 669	170	4	549	—	54	6 218	170

Index of average earnings in September

Average earnings of employees in Great Britain are estimated to have risen by 15.0 per cent between September 1977 and September 1978. This estimate is based on the monthly index for the whole economy, covering in total about 21 million employees, which was introduced from January 1976 (see table 1).

In the production and certain other industries (table 2), employing in total about 11 million employees, and covered by the older series index introduced from January 1963, earnings increased by about 16.1 per cent over the 12 months to September.

Table 1 Index of average earnings of employees in Great Britain

Whole economy (new) series, not seasonally adjusted

	Index Jan 1976 = 100	Percentage increase over 12 months
1977		
August	115.7	7.3
September	116.6	7.7
October	117.9	8.7
November	120.1	8.6
December	121.7	9.4
1978		
January	121.5	9.5
February	122.7	10.5
March	125.0	10.4
April	127.2	12.4
May	129.4	12.6
June	133.1	15.4
July	133.6	14.2
August	131.7	13.9
September p	134.2	15.0

p Provisional.

Table 2 Index of average earnings in production industries and some services [1]

Older series

	Seasonally adjusted			Unadjusted index January 1970 = 100
	Index January 1970 = 100	Percentage increase: Over previous month	Percentage increase: Over previous 12 months	
1978				
February	311.0	1.6	11.5	311.2
March	317.3	1.2	11.2	314.8
April	325.9	3.4	14.8	325.7
May	330.9	0.4	14.5	327.2
June	336.6	2.1	16.6	334.0
July	338.0	−0.4	16.2	332.7
August	332.8	0.1	15.8	333.2
September p	339.4	1.4	16.1	337.8

p Provisional.

[1] Transport and communication (other than sea transport and postal services) and some miscellaneous services.

Indices of basic rates of wages

At the end of October 1978, nationally-negotiated basic weekly rates of wages of manual workers were on average 17.4 per cent higher than a year earlier. During October, the index of basic weekly rates increased from 265.9 to 269.4.

The indices only take account of changes in nationally-negotiated rates. The year-on-year increases consequently reflect that national rates for engineering workers remained unchanged from February 1976 until April 1978.

Inquiries: Watford 28500 ext. 319

Table 3 Indices of basic rates of wages

	Indices, 31 July 1972 = 100		Percentage increase over previous 12 months	
	Basic weekly rates	Basic hourly rates	Basic weekly rates	Basic hourly rates
1978				
31 May	259.7	261.3	15.2	15.2
30 June	263.3	264.9	15.8	15.8
31 July	264.7	266.3	16.0	16.0
31 August	265.9	267.5	16.2	16.2
30 September	265.9	267.5	16.1	16.1
31 October	269.4	271.0	17.4	17.4

Do you use statistics?

The Government Statistical Service (GSS) prepares a wide range of reliable and detailed figures on the United Kingdom. It is usually worth checking to see if what you want is available from them. You can see many Government statistical publications at your local public library, buy them from HMSO or refer to the comprehensive collection held at the Statistics and Market Intelligence Library, Export House, 50 Ludgate Hill, London EC4N 7HU (tel. 01-248 5757 ext. 368).

A free pamphlet, *Government Statistics – a brief guide to sources*, gives up-to-date contact points in Departments for further information. You can obtain copies from regional officers of the Department of Industry or by writing to the Central Statistical Office Press and Information Service, Great George Street, London SW1P 3AQ.

Registrations of British, community and foreign films

The following are details of films registered by the Department of Trade under the Films Acts 1960 to 1970, as amended by the European Communities Act 1972, during the week ended Friday, 1 December 1978.

BR/E indicates that the film is a British quota film, EC that the film is a quota film. The date which forms part of the registration number of each is the date on which quota life of the film expires.

Title of film	Registered no.	Playing time minutes	Date of registration	Registered in the name of	Maker's name
BRITISH					
Movietone News 2582	BR/E 39606/3/12/83	8	1 December	British Movietonews Ltd	British Movietonews Ltd
FOREIGN					
Interiors	F39812	92	30 November	United Artists Corporation Ltd	Jack Rollins and Charles Joffee Productions, Heywood Productions Inc. and Hillary Productions, New York
Death Trap	F 39813	90	30 November	Tedderwick Ltd	Mars Productions California

Correction to the Register
The maker of the film "Natural High – The Commodores on Tour" (BR/E 39656/2/7/83) registered on 27 June 1978 has been corrected to Emitel (EMI Audio Visual Services Limited).

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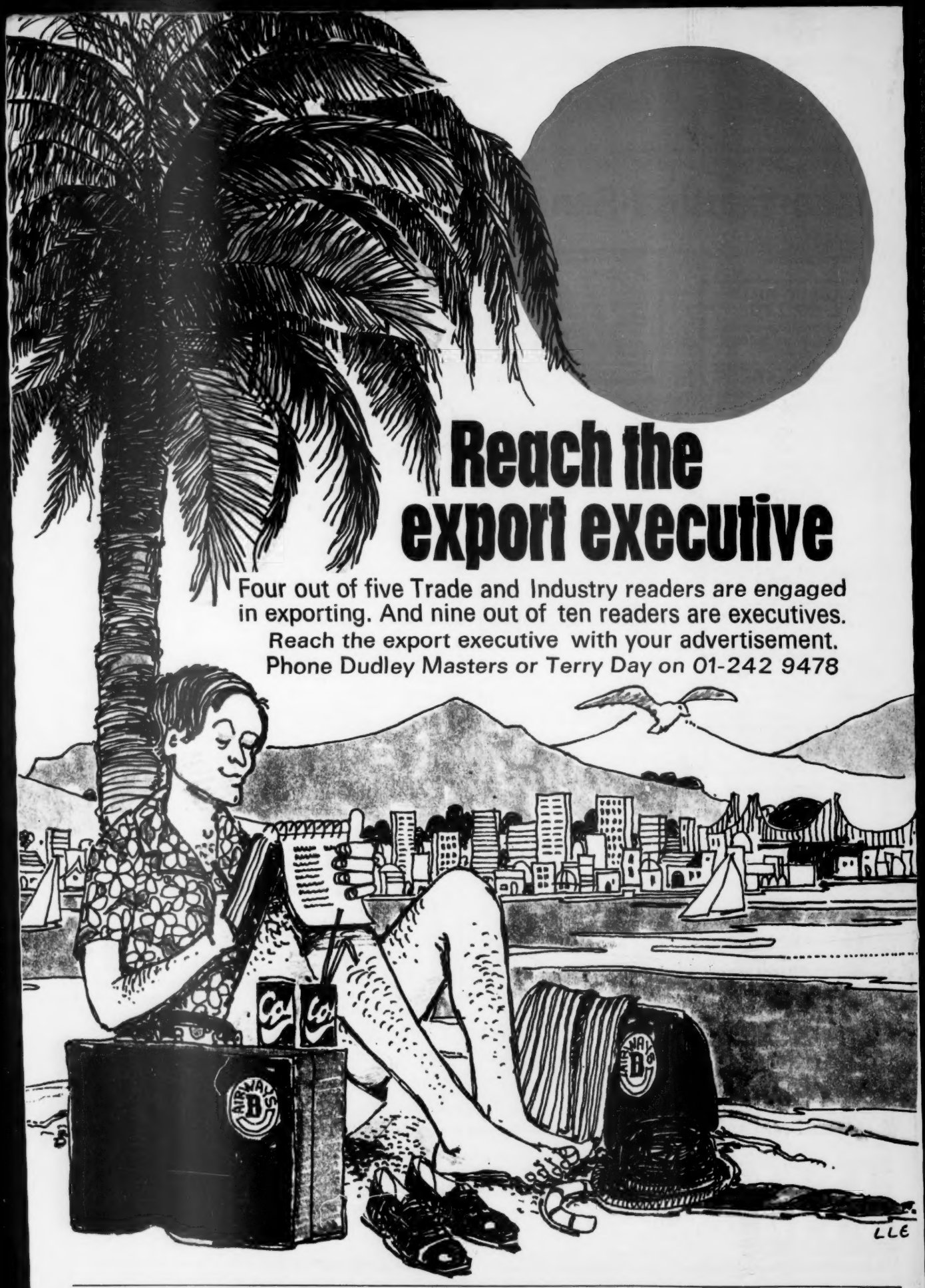
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